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RADIO TODAY--AND TOMORROW

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INTRODUCTION

The National Association of Broadcasters (NAB) commissioned Browne, Bortz & Coddington (BBC) to prepare this study, "Radio Today--And Tomorrow."

The radio broadcasting industry is faced not only with important changes in demographics, lifestyles and tastes of its audiences but also with a proliferation of new electronic media, from electronic video games to cable television. To assess what these changes might mean for radio broadcasting, the NAB requested BBC to:

- Review current and projected demographic and social trends in the United States with respect to their potential impacts on radio broadcasting.
- Conduct and analyze the results of a telephone survey of 1,500 households, exploring in detail their media habits as well as demographics, individual perceptions of themselves, and lifestyles or tastes.
- Develop a forecast about how new technology, when combined with changing audiences and tastes, might affect the future structure and strategies of the radio broadcast industry.

Organization of the Report

The first section of the report integrates the results of the survey with an analysis of demographic and societal trends in the U.S. In particular, radio listening preferences and behavior for various subgroups (e.g., by age, education, and several "pyschographic" and lifestyle measures) are analyzed and compared with other subgroups and the population as a whole.

The second section reviews new technological developments and relates them to the findings developed in the first section to prepare a forecast of changes that can be expected within different segments of radio broadcasting. The emphasis is on identifying important change factors and how to monitor and evaluate these changes, rather than an attempt at prophecy.

The general survey methodology and the questionnaire is set forth in Appendix A. Responses to all survey questions are tabulated in Appendix B. A selected set of tables is presented with more detailed data analyses (e.g., "cross tabulations," such as how radio format preferences are related to certain demographic and lifestyle measures). The sheer number of such analyses conducted precludes including more than a limited selection of them in this report. Those desiring additional data should direct inquiries to the NAB.

Acknowledgments

The demographic and social analysis, including survey design, was directed by Dr. Harold Mendelsohn, University of Denver. David Nelson, BBC,

supervised conduct of the survey. Field work was contracted to Texas Field Services, Inc., a subsidiary of Research and Planning Consultants, Austin, Texas. Data analysis was directed by Arthur Steiker, BBC. Other BBC staff assisting in this study include Maureen Crocker, Mary Helen Friesen, Debra Hash and Cindy Kitterman.

Both authors (Mendelsohn and Bortz) participated in a 1981 study on the future of radio sponsored by the Center for Public Resources (CPR). Selected material incorporated in this report was originally prepared by the authors as part of their efforts for CPR.

SUMMARY

Extraordinary changes are occuring in both society and communications technology. This study was built around exploration of the thesis that these changes will affect media behavior--including radio listening and ultimately the structure of the radio industry.

The Uses of Radio

Survey results were analyzed to determine not only who uses radio but also to understand why and how the audiences use radio. Radio's role in providing entertainment and news/information was analyzed and compared with how other media serve the same functions. For example, two-thirds of the sample uses radio primarily for entertainment and less than one in six use it primarily for news/information, with the balance of respondents unable to give primacy to one of the functions.

The uses of radio are analyzed from the instrumental (six in every 10 listeners saying radio provides helpful information on local and national emergencies) to the psychological (64 percent identifying radio as a source of companionship).

Analyzing responses by a number of different cohorts identified many significant differences in these uses among certain groups. For example, high school graduates differ in many ways from college graduates in radio listening--in format preferences, amount of listening, and whether they use radio for entertainment or information.

Changes in work and the role of the working woman were examined in terms of overall media usage and radio usage in particular. Although there was little difference in the amount of radio listening between the working woman and the woman not employed outside the home, the two groups differed in many other ways. The working women was half as likely to mention religious radio formats as a preference and much more likely to prefer classical music. The traditional female homemaker used radio less than her employed counterpart "to escape everyday pressures" but is less likely to seek specific programming regardless of station.

As the "baby boomers" move from the media researchers niche of "18 to 34 years old" into the age of 35 to 54 group, further media behaviors will change. Pursuing job and family goals affects all media behavior, including radio. With radio formats heavily skewed to young listeners, the aging of the U.S. population will have profound effects. In today's population, survey results showed sharp distinctions between the two age groups. Format preferences, amount of radio listening, functional uses of radio, and areas of personal interest differ.

Considering a respondent's self-perception as a "modern" or "traditional" person also was helpful in distinguishing media behavior. For example, today's moderns are far more likely to express high interest in show business and entertainment, in sports, in the outdoors and in science or tech-

nology. The "modern" is more likely to listen to radio, but less likely to see it as a source for news and information. The traditional listener is more likely to favor news, "nostalgia/beautiful music," country/western and classical formats, the modern rock and disco.

With radio listening so closely tied to many factors, demographic and social, that distinguish groups within society, as these groups change within the society, it is reasonable to anticipate changes in their use of radio.

Radio Tomorrow

Radio broadcasting has been a volatile industry almost from its inception. Dependent to a great degree on radio networks until the national introduction of television in the late 1940's and early 1950's, radio became a more local medium in the 1960's. From less than 3,000 stations in 1950, the industry has grown to over 9,000 today, resulting in a fiercely competitive, ever-changing market.

Cable television, pocket-sized TV's, video and audio cassette recorders, electronic games--all these electronic media forms and more, are seeking the attention of American audiences. Technological change will interact with the demographic and social changes underway. What are the implications for radio?

Perhaps the most meaningful potential impact lies with functional equivalents to radio. With 24 hour TV news, all-music video formats, and cable audio programming, "listening to radio" might be substantially redefined.

Competition will not be limited to seeking of audiences. The cable television industry has fixed its attention firmly on the local advertising market and, with a pocketful of $20 to $50 local ad availabilities, views itself as competing directly with radio. Easy to discount in its current primitive state, cable advertising is expected to add more salespeople to the current radio/TV/newspaper crowd now seeking advertisers.

Stations, networks and program syndicators all will be affected by the changing marketplace. Increasing differentiation among segments of our society calls for more differentiated programming. The challenge to provide new types of programming will require changes in the roles of all elements of radio broadcasting.

Specialized syndicators, appealing for example to the professional working woman, can provide the unique programming necessary in a more segmented market. Using satellite delivery independently or selling such features to the new "lifestyle-oriented" satellite networks will provide important distribution economies.

"Full-service" networks such as Satellite Music Network, Bonneville, and ABC Talk Radio will meet the needs of certain stations for highly automated operations that still provide distinctive, "live" programming.

Further in the future, the tremendous information capacity of urban cable systems and fiber optics telephone plant will lead to demand programming, the ultimate form of the old request radio format. In demand programming, a listener can immediately call up a desired program and have it transmitted only to his residence. Certain early forms of this are entering the market even now. Advances in digital transmission, signal multiplexing and integrated circuitry will lead to the eventual rapid growth of this form of program delivery.

Technological change should be viewed as an element facilitating meeting the needs of a changing marketplace. Radio broadcasters will have to meet the new competition provided by new electronic media, and, if they choose, broaden their role in program delivery by participating in some of the new forms.

This report does not attempt to--and indeed could not--provide a prescription for future broadcaster strategies. It does endeavor to identify the critical factors that will change the broadcast industry and provide a basis for understanding and meeting the challenges of the next decade.

SECTION I. THE USES OF RADIO--CHANGING DEMOGRAPHICS AND POPULAR TASTE

The emerging new media technologies that are about to envelop us are mostly oriented to the dissemination of video messages. The question is raised, what is the future of radio broadcasting in the age of the new video technologies?

As a part of this study, a telephone survey was conducted of 1,500 households in June/July 1982. The survey consisted of a detailed profile of the respondents' media usage as well as standard demographic and psychographic measures. The results of this survey are combined with demographic, lifestyle and taste trends to describe the current uses of radio and to project into the future. (Appendix B contains detailed tabulations of survey data.)

The New Media and Radio Usage

Presently it appears that the new media per se are not affecting radio listening to any serious degree. At least not as yet. The 1982 survey conducted for the NAB as part of this study found almost no homes in America without access to at least one radio. As a matter of fact, data from the study indicate that:

- 25 percent of all the households in the USA have access to 1-3 radio receivers.
- 46 percent have access to 4-6 sets.
- And 29 percent of all the households in the land have seven or more radios available to their occupants.

Additionally, equipment for other electronic media abound in U.S. homes:

- 82 percent of all households are said to contain some form of stereo or hi-fi equipment.
- 71 percent claimed access to an audio tape/cassette recorder-player of some sort.
- 23 percent of the respondents interviewed reported the presence of some form of electronic games in their homes.
- 15 percent claimed possession of a VCR (video cassette recorder).(1)
- Three percent said that their households have a home computer/word processor of some sort available.
- Two percent claimed possession in the home of a video disk player.

Despite the proliferation of alternative electronic media in many American homes, as a leisure-time activity "listening to the radio" still ranks third in overall popularity (34 percent) immediately below engaging in sports and fitness activities (35 percent) and at a considerable distance from first-ranked "watching TV" (50 percent). Listening to radio ranks above fourth place book/magazine reading (25 percent); fifth place newspaper reading (15 percent); eleventh place "listening to records/tapes" (eight percent); and seventeenth-ranked "going to the movies" (four percent).

Moreover, the new video media appear to be more attractive to the currently heavy radio listeners (comprising 30 percent of the BBC sample and defined in the table below) than they are to either the moderate (35 percent) or light listeners (comprising the remaining 35 percent of the 1982 sample).

In other words, to date heavy listeners appear to fit in their new visual media with their listening schedules without too much difficulty. How long they will continue to do so is difficult to estimate at this particular point in time.

	Light Listeners (1 hr. daily or less)	Moderate Listeners (More than 1 hr. through 4 hrs. daily)	Heavy Listeners (More than 4 hrs. daily)
Electronic games			
Now own (22 percent)	20%	21%	27%
Plan to buy (6 percent)	4	8	7
No plans to buy (72 percent)	76	71	66
Video Cassette Recorders (VCR's)			
Now own (14 percent)	14%	14%	17%
Plan to buy (6 percent)	4	6	7
No plans to buy (80 percent)	82	80	76
Video Disk Players			
Now own (2 percent)	1%	2%	4%
Plan to buy (3 percent)	2	3	3
No plans to buy (95 percent)	97	95	93
Home Computers/Word Processors			
Now own (3 percent)	3%	2%	4%
Plan to buy (7 percent)	5	8	7
No plans to buy (90 percent)	92	90	89

Overall then, it would appear that for the present the new visual media technology by themselves are having very little influence on radio listening as an audience activity in and of itself. It seems that this will be the case for the immediate future as well. For the long-run, however, as new technologies challenge the current entertainment functions of radio, today's radio listeners may turn to them more and more.

A Changing Society

Changing media technologies are not the only new challenges that confront radio broadcasters. Since the end of World War II profound changes have also been occurring in the very structure of American society, and it is these changes that can be expected to pose the most serious problems for radio broadcasters who wish to address effectively what lies ahead.

One important reason for posing the question of radio's future emerges from the fact that historically, broadcasting did not stem from any specific human or social need. Rather, radio technology emerged and then found needs to fill; needs that could lead to revenues and a financial base.

Raymond Williams poses the issue quite succinctly:(2)

> "Unlike all previous communications technologies," he wrote, "radio and television were systems primarily devised for transmission and reception as abstract processes with little or no definition or content. . . . It is not only that the supply of broadcasting facilities preceded the demand; it is that the means of communication preceded their content."

Without doubt, unless the new media match their innovativeness in hardware with creativity and imagination in functional content, the marketplace will react to them with little enthusiasm. The initial purchases of new media hardware, such as VCR's, video discs and home computers, are attracted by innovativeness in hardware--but large market penetration will depend on the development of functional content.

The lesson is clear--gimmickry alone no longer sells. Imaginative reaction to changing audience interests, tastes and expectations on the other hand may very well lead to ultimate success in the broadcast marketplace of tomorrow.

The future of radio broadcasting may very well rest on the understanding broadcasters acquire of the changes that are occurring and are likely to occur in audiences throughout America. Because the future has a history, and that history is taking shape right now--it is critical that we profile today's radio audience along several dimensions that go beyond the usual gross demographic descriptions of radio listeners.

This section is organized around the following thesis:

> Today, we either are approaching, or we are actually in a critical juncture point where extraordinary changes in both society and in communications technologies have either encountered each other already, or are about to. These changes are reflecting themselves in the "new" interests many Americans have been developing along with the "new" activities a lot are taking part in. Interests and activities reflect popular tastes. As popular tastes change, so do media behaviors . . . including listening to the radio.

The Fundamental Functions of Radio

From its very inception as a commercial medium, radio has performed two major functions for listeners--one informational, the other entertaining. Under the informational rubric, radio has provided audiences with news and information regarding potential dangers from both nature and mankind; with analyses and commentaries on a wide range of topics; with instrumental information which listeners could use in their daily lives; plus smatterings of cultural fare designed to "uplift." On the entertaining side, radio has given audiences much pleasure via its music, comedy, disc jockey chatter, dramas, and so on.

Until the advent of television, not only did radio provide audiences with news, entertainment and information, but it was the principal source of these things for great majority of Americans. Today, the study shows that the primary function of radio for two-thirds (64 percent) of us is entertainment. No more than 15 percent turn to radio primarily for news and information and 19 percent listen primarily for both purposes.

If radio no longer acts as a primary or unique source of news, information, and entertainment, then how can one explain the near universal presence of radio receivers (5.4 per household) in American society plus the fact that all of us over the age of 11 are estimated to spend an average of 3.08 hours per day tuned in to radio?(3)

The answers have rested in the more subtle psychological and instrumental functions that radio appears to have served in the past and continues to do at present.

Some 20 years ago researchers began demonstrating that audiences had a wide range of reasons for tuning in radio, and that those reasons were more or less socio-psychological in nature. In other words, radio tune-in was more a consequence of audiences' subtler needs, which were both numerous and dynamic, than they were for just news, information and entertainment.

It was in 1960 in the study of WMCA audiences by one of the authors (Mendelsohn) that it was first pointed out the variety of psychological functions that post World War II radio was serving.(4)

Radio was affording audiences a sense of order to their daily lives; it was serving as a significant "presence" to listeners; radio provided both mood accompaniment and psychological stimulation as well as tension release; and the medium afforded linkages with events other than those taking place in the personal lives of the listeners.

Today there is no doubt about the roles that expected psychological gratifications play in motivating various audiences to tune in to radio.

The current study indicates that radio continues to bracket the day for many Americans. Contemporary radio serves to spur most of us (72 percent) on in the morning, and more than four in 10 (43 percent) Americans claim they are "tucked in" by radio at bedtime.

Contemporary radio is used by listeners either to sustain or to change a variety of psychological moods. Here are illustrative responses from the investigation:

a. "Listening to radio lifts my spirits," 77 percent

b. "Listening to radio provides me with companionship, and keeps me from getting lonely," 64 percent

c. "Listening to radio helps me to get away from the pressures of everyday living," 62 percent

On the matter of linkage, contemporary radio still helps most listeners (52 percent) feel that they are indeed "taking part in important things."

In addition to the psychological gratifications that listeners experience from contemporary radio are the instrumental uses the medium serves its listeners.

Cases in point from the study are:

a. The nine in every 10 listeners who state that, "Listening to radio keeps me informed about what is happening."

b. The eight in every 10 listeners who declare that radio would play a "very important part" in helping them to keep abreast of happenings should a serious mishap take place in their locales.

c. The six in every 10 listeners who claim that they depend on radio to provide them with usable information regarding local or national emergencies.

d. The three in every 10 listeners who assert simply that radio is a general source of useful information for them.

Taste and Its Influence on Radio Listening

What causes audiences to choose at any given time to attend to one medium over another, and then to select one type of fare over others remains puzzling. The technological functions and limits of the medium, time, and the demographic attributes of the individuals making the selections are but three overly simplified "causes" of radio listeners' preferences. By themselves, they do very little to explain why, for example, given three sub-groups of married women with everyone aged 37-39 and whose families gross $28,000 a year and who reside in the same market--why one sub-group will tune in the radio precisely at 5 p.m. every Thursday afternoon; the other will turn on the TV set at precisely that time; and the third will do neither, but instead will turn to reading a novel at the very same hour. Nor can technological function, time or demography explain why some of these ostensibly similar women in obstensibly similar circumstances choose, for example, to listen to "beautiful

music" when they turn on their radios, while others turn to the "album rock" station, and still others tune "phone-in talk" shows.

Obviously, factors other than sheer demography are at work.

Perhaps the most neglected factor that can account for variabilities in behavior has been the key matter of "taste." Amazingly, we know very little about the mediating role of taste. Knowledge about the phenomenon of taste as it affects radio listening generally has been theoretical, polemical, anecdotal and inferential. It is only within the past several years that we have begun to make serious scientifically respectable efforts in the direction of examining audience tastes systematically and in depth.

Early "psychographic" attempts such as Massey's (1965) began to apply relatively new multi-factorial statistical techniques to delineating possible personality attributes, such as "individualism" in the search for the whys of audience preferences in radio programming.(5)

Several years later the Katz, Gurevitch, Haas (1973) effort demonstrated how factors such as attitudes, interests, values and media usage affected audiences' preferences.(6)

What has been emerging in mass communications research over the past 15 years or so is the slowly-developing realization that homogeneous, undifferentiated mass audiences really do not exist as such.

Audiences for all the media have been becoming more and more segmentalized as a consequence of a variety of changes occurring in media technology (e.g., portability), plus those that were taking place in society (e.g., new social roles for women) as well as of those that occurred in the formats and contents of the media themselves (e.g., "magazine" formats in television, newspapers and on public radio).

When attempts are made to link media preferences to audiences' tastes (as expressed in their interests and activities), to social-psychological aspects of personality (as expressed in their values and attitudes), to their actuarial characteristics, what is being done is what clumsily and inaccurately is identified as "psychographic analysis." (In its initial conceptualization, psychographic analysis referred exclusively to the psychological delineation of clinical personality traits that directly affected consumer and audience behavior. Although the success of these early attempts to link complex audience behavior to singular personality characteristics has been mixed at best, psychographic research has helped in the development of hypotheses regarding possible linkages between personality characteristics and attitudes, beliefs, values, gratification expectations, interest or activity orientation.) Still, psychographic analysis makes sense in discussing the future of radio, for as technology and social structure change, so will listeners' attitudes and values. As values are altered, interest and activities will alter. And as all these changes take place, new tastes will emerge as old ones shift or diversify. Finally, as taste changes, so do media behaviors.

Two important studies point to directions beyond demographic descriptions that the thinking about the future of radio listening must take.

One is Frank and Greenberg's 1980 study of "Who Watches (TV) and Why."(7) The other is an in-depth functional study (in which Mendlesohn was a major participant) conducted of American audiences vis-a-vis a wide array of socio-psychological factors that contribute to their uses of discretionary time, to their media behaviors and to their consumer behavior.

Frank and Greenberg statistically segmentalized audiences by demographics, as well as by "interest segments" and "needs." The resultant typologies were profiled, and their media (principally television) usage behaviors analyzed.

The second study was conducted by ABC in 1981 with the assistance of Mendelsohn and BBC (not publicly available). In this investigation, three major taste publics were identified in contemporary America according to their interests in the arts: high culture fans (16 percent of the adult population); middle culture fans (29 percent of the adult population); and popular culture fans (55 percent of the adult population).

Together the two studies point to a relatively new and quite significant alignment of tastes among Americans. For one thing, the near disappearance of purists from the taste spectrum was notable . . . those alleged eggheads who supposedly never look at a TV set or tune in a radio receiver.

This is happening neither haphazardly nor without reason. The gradual upward tilting of cultural tastes in America are outcroppings from certain massive shifts in demography and social structure that have been taking place over the past two decades--shifts that will continue into the future indefinitely.

Consider the current "arts" oriented audience cohort for a moment. It had become a cliche of broadcasting lore that the arts oriented audience comprised no more than five percent of the total--and that this cohort embraced only esoteric fare.

The ABC study brought into question that stereotype, and urcovered a very substantial viable audience out there--an audience that could equally appreciate a good basketball game as well as a good ballet; a concert by the Who as well as one by Pavarotti; a film directed by Fellini as well as the latest Spielberg effort.

This study takes us a step further.

Fully 20 percent of the adults sampled in the summer of 1982 reported that "keeping up with the arts, classical music, and literature" was "very important" to them. This is nearly the same as the 22 percent who averred that "keeping up with the world of show business and entertainment" is "very important" to them--an area of interest generally assumed to have much broader appeal.

Here are the preferred radio program formats of the two interest cohorts:

Radio Format	Total (N = 1,433)	Arts Oriented (N = 292)	Entertainment Oriented (N = 314)
News	50%	52%	47%
Undifferentiated rock	18	15	20
Top 40	12	10	17
Contemporary rock	11	10	14
Album rock	3	4	4
Country/western	32	24	29
Classical; opera	17	33	19
Talk; phone ins; interview	15	19	17
Nostalgia, "beautiful music"/easy listening	17	15	14
Jazz	8	8	6
Sports	9	8	11
Religious fare	8	8	5

A number of interesting observations emerge from these data.

First, "classical music, opera" ranks a clear fourth among 12 program formats that are currently favored by all radio listeners.

Second, listeners who are highly interested in the arts and prefer radio's classical music offerings are by no means "arts snobs." They do not differ that much in their tastes from the radio audience as a whole--with one or two exceptions. The arts-oriented listeners do differ from their entertainment-oriented counterparts in their more frequent preferences for news and classical music and thus less frequent favoring of rock music formats other than those featuring "album rock".

Here we begin to see how differences in taste that begin with across-the-board societal gains in educational achievement eventually impact upon audiences' radio programming preferences. All indications are that this "up scaling" of taste will not only continue into the future but will actually accelerate as more and more Americans continue with their educations for longer periods of time.

The New Segmentalization

Audience and consumer segmentalization in the United States has been occuring primarily as a consequence of the convergence in our time of two radically changing forces that have come to interact in profound ways ever since World War II--radical changes in our demography, social structure and ideologies interacting with radical changes in our science and technology. It matters very little whether one force is the "cause" of the other. What matters is that the interactions between them are likely to produce profound social, political, consumer and media behavior changes for all of us in the future.

In the wake of World War II we have become a near-totally urbanized society; we gave birth to the largest single demographic cohort that we had ever produced in a single generation, the 75 million infants that made up the "baby boom" and who today are rapidly approaching the beginning of middle age;

we began to move away from working in the production of goods into the provision of services; we started to jam up our education pipelines; we commenced to concern ourselves with the more abstract and sophisticated aspects of life in a democracy--civil rights, education, social amelioration, space exploration, peace, pollution, child rearing and the like.

Both our interests and war-constrained incomes began to expand at a heartening pace immediately after the shooting ceased. Together the new interests and affluence synergized into expanded periods of time that individual Americans and their families could for the first time devote to non-work; that is, to "leisure."

And the media--now in considerable competition with each other due primarily to the functionally equivalent nature of television (it could do everything all the other media could do)--the media eagerly began pursuing us in their efforts to capture at least portions of our attention, loyalty and dollars. They pressed their suit primarily by addressing our newly formed, relatively cosmopolitan individualized interests and tastes.

We responded in kind, so that according to Nielsen, Americans actually were spending roughly eight hours a day with the broadcast media alone in the 1950s as compared to just half that amount in the 1940s. Beyond the 1950s, we generally devoted between 7 and 7.5 hours each day to TV and radio during the sixties; and somewhat over 8 hours on average during the 1970s.

But that is not all we were doing. Additionally, by the hundreds of thousands and millions we Americans were reading paper-backs, going to the movies, attending sports events, listening to recordings, leafing through magazines, visiting museums and exhibits, taking courses, participating in organizations and associations, and buying concert, opera and theater tickets.

And then it suddenly occurred to us our once monolithic mass audience was beginning to break down, to "de-massify" in Toffler's words.(8) It was fragmenting; segmentalizing.

> "At the end of a generation of economic progress and educational advance," observes Anthony Smith, "America's 200 million market is losing the homogeneity it spent so many decades in acquiring and nurturing. The growth of specialization in jobs has contributed to thousands of tiny sub-groups, which may cohabit within the same suburb or the same corporation but take widely different views of the world and spend their time pursuing quite different interests."(9)

Now, as a nation we are growing older. At the same time, our people are becoming better educated, and our interests and tastes are beginning to show gradual upward tilting. Our workplaces are changing quite drastically from a production of goods base to an information exchange base, and the tasks we are employed to perform are accompanying that fundamental change. Women are emerging to fulfill roles and functions that they never had been called upon to do before. The growing visibility of women as an independent force in the marketplace matches in very important respects the previous consequential

emergences of bourgeoise and proletariat mass markets and audiences, the former resulting from profound changes in the politics of 18th century Europe and America; and the latter occurring as an offshoot of the 19th century Industrial Revolution.

Changes in Educational Achievement: The Up-Scaling of Tastes

There is no doubt that Americans are becoming increasingly educated; today, nearly a third of the adult U.S. population has had some college education.

The dramatic upward movement in educational attainment levels has sent shock waves throughout society. It has "democratized" science, knowledge, and "good" taste--once the exclusive domains of the smallest elites; it has altered our perceptions of the universe and the roles to be played by society and individuals in it; it has made us "science-conscious."(10) It has stimulated reevaluations of the human condition, of government, economics, work and leisure, of "human rights" and the "quality of life;" it has affected fundamental social and personal values, as well as aesthetic standards and choices.

Small wonder that we have been noting evidence of a general upgrading in taste among number of Americans who have been increasing their purchases of books, art and classical recordings; who have been attending museums, concerts, ballet, opera and live theater in proportions that challenge attendance at sports events. The print media, public television, and FM "fine arts" radio have always been sensitized to the specific scientific and arts tastes of small audiences whom they tried to serve in rather limited ways.

Given the previous observations concerning the "arts" audience cohort, one need not elaborate too much on the differences in media orientations and habits that increased educational achievement effects to realize how potentially significant the emerging well-educated audience cohorts of the future will be.

Just consider a few selected examples of current differences that distinguish college graduates (16 percent of the sample) from high school graduates (37 percent).

Audiences with no more than a high school diploma differ from audiences with a college degree in all three key areas of function, frequency and preferences in radio listening.

- High school graduates are more likely to be heavy listeners than college graduates; college graduates tend to be moderately frequent listeners.

- High school educated listeners are more apt to use radio mostly for entertainment while college educated individuals are more apt to turn to radio for both its entertainment and news/information offerings.

- Where on a proportionate basis high school graduates are more likely to prefer county/western music, college graduates are most apt to favor news and classical music fare.

Additional differences in programming preferences are the twice as likely choice of religious fare and talk formats among listeners with a high school background, and the slightly higher choices of top 40 music that are manifested by college educated listeners (as contrasted with the increased interest in disco music that is expressed by those with secondary school achievement only). (See Table 1.)

Aging of the Population

As both mortality and fertility in the U.S. have declined, the population of the USA is "aging." Today there are 28 million Americans over 65 years of age (up 28 percent from 1970). By 1985 the median age of all Americans will be 31.1 years (as compared to 28.1 years in 1965). The Census Bureau projects a median age of 36 by 2000 and 38.4 by 2010. Where young people 19 years old and less made up half the population in 1890, they will comprise less than a third of the total in the year 2000. At the same time persons aged 45 and over will have increased significantly from 11 percent of the total in 1890 to an estimated 40 percent of the total in the year 2000. The proportional shift of the elderly, 65 and over, is even more consequential--from just two percent in 1890 to 14 percent in 1980 to an expected 18 percent in the year 2000.

Age has been a powerful factor in the determination of popular culture tastes, and no doubt will continue to be so. In particular, radio has been attracting the "Baby Boom" youth cohort over the past 25 years or so with considerable success. What is of extreme importance for radio decision-makers to consider for the future is that the boom babies of the 1950's and early sixties have already begun to enter their maturing "responsible years"--their late 20's and 30's--ages that are devoted to career building, marriage and an overall "settling down." By 1990, this group will begin to approach late 30's and early 40's (i.e. middle age) so that no more than 10 years hence the single largest segment in the population--nearly 38 percent--will be aged 25-44.

What the continuous aging of the population means for the mass media is that the near fifth of the population that may be retiring from work by the year 2000 will have many additional years of discretionary non-work time (so-called lesiure time) available to them. These "new" audiences not only will have significant chunks of time to spend with the media (among other possibilities), but they will have completely different needs, values, interests and consequently, tastes vis-a-vis the fare that the media will be providing.

For decades now broadcasters have concentrated--with considerable success--on the 18-35 age cohort. Coming age shifts in American demographics calls for moving our attention to the maturing "older" rubrics on the age spectrum. Two current cohorts--those between the ages of 35-54 (soon to be multiplied by the 75 million making up the Baby Boom of yore) plus persons between the ages of 55-64. The former cohort accounts for 30 percent of the BBC sample, and the latter, for 13 percent of the adults interviewed in the study.

TABLE 1. EDUCATIONAL ATTAINMENT AND LISTENING PATTERNS

	Total (N = 1,433)	High School Graduates (N = 522)	College Graduates (N = 233)
Frequency of listening to radio			
Light	35%	34%	37%
Moderate	35	34	44
Heavy	30	32	19
Listen to radio			
Mostly for news/information	15%	15%	18%
Mostly for entertainment/ relaxation	64	65	57
For both equally	19	18	24
Neither	2	2	1
Preferred program formats			
Classical music; opera	17%	14%	23%
Country/western	32	37	24
Undifferentiated rock	18	14	17
a. Contemporary rock	11	11	12
b. Top 40 rock	12	12	15
c. Album rock	3	3	4
Disco	6	7	4
Nostalgia; "beautiful music"/easy listening	17	18	18
Jazz	8	9	6
News	50	49	61
Religious fare	8	8	4
Sports	9	9	8
Talk; Phone in; interview	15	16	11

Note: Respondents could list more than one program preference. Percentage will not add to 100.

Note: Percentages on this and subsequent tables are adjusted to include only those responding to a particular question. Non-respondents and those answering don't know or other choices not shown are not included. See Appendix B for further explanation.

As the following highlights show, the two "upper-age" cohorts each is distinctive from the other on every conceivable measure, and in most instances each cohort differs quite dramatically from the radio listening population as a whole (see Table 2).

For example, we see that where the lower half of the age bracket twosome is more interested than is the upper half in science and technology and the outdoors, such interests are no greater than for the population as a whole. In contrast, the interest in sports as well as the interest in the arts that are expressed by listeners aged 55-64 in each case exceed those of both the listeners in the 35-54 bracket plus listeners in general.

Older listeners as compared to their somewhat younger people enjoy watching TV and gardening, while the 35 to 54s are more apt to spend some of their leisure time reading.

The older cohort appears to be more "other-directed" than does the younger sub-group, and the latter listeners seem to be satisfied to simply "blend in" with their peers.

On the other hand, those in the 35-54 category appear to be more "inner directed," and to pursue social uniqueness and distinction of one sort or another. It is these characteristics perhaps that contribute to their relatively more frequent achievement of "opinion leader" status at least with regard to products and services as well as in regard to regional and local affairs.

Although the two group's frequencies of listening to radio do not differ sharply (those aged 35-54 are somewhat more likely to be "moderate" listeners), their uses of radio do differ from each other rather substantially.

Older listeners, for one, are generally more attentive to radio; they are more likely to be selective of the particular stations they wish to listen to (or not); and they are more apt to turn to the public radio outlet, if one is available to them.

Listeners between the ages of 35-54, as compared with their immediately older confreres, are more apt to turn to radio for psychological uplift and for news and information (no doubt to be put to use in their opinion leadership roles).

The taste differences in the two "upper" age cohorts ultimately manifest themselves in wide differences in programming preferences.

Where the lower age sub-group shows absolute enthusiasm for country/western fare, the upper cohort shows a similarly high degree of interest in news.

Where the younger sub-group is twice as likely to voice a preference for "contemporary rock," the older sub-group is twice as apt to choose religious programming.

TABLE 2. AGE OF LISTENERS VS. INTERESTS, ACTIVITIES, LIFE STYLE AND USE OF RADIO

	Total (N = 1,433)	Listeners Aged 35-54 (N = 424)	Listeners Aged 55-64 (N = 181)
Major Differences in Interests, Activities, Life Style, Frequency of Radio Listening, Functions of Radio, and Program Preferences			
Interests			
Consider it "very important to keep up with"			
a. Science/technology	34%	35%	28%
b. Sports	28	23	36
c. The arts, music, literature	20	19	26
d. Outdoor life, camping, hiking	34	32	23
Activities that are Preferred			
a. Watching TV	50%	51%	56%
b. Reading books/mags.	25	30	24
c. Gardening	13	15	22
Out-going, many friends	46%	43%	49%
Inner directed, few close friends	54	57	51
Conformist; "fits in;" just like every one else	44%	43%	57%
"Standout" from the crowd	56%	57%	41%
Respondent is opinion leader in regard to product/services.	18%	19%	11%
Respondent is opinion leader in regard to local/regional affairs.	34%	36%	30%
Frequency of Listening			
Light	35%	41%	43%
Moderate	35	35	30
Heavy	30	24	27
Listens to Public Radio "every chance I get"	24%	27%	34%
Listens to radio without doing anything else "very often"	11%	7%	12%
Tunes in specific stations for preferred progamming	65%	67%	73%
Functions			
Radio "lifts spirits"	77%	75%	69%
Radio "keeps me informed"	89	93	88
Programming Preferences			
a. Country/western music	32%	42%	27%
b. Nostalgia, "beautiful music"/easy listening	17	20	29
c. Undifferentiated rock	18	9	1
1. Contemporary rock	11	8	4
d. News	50	57	68
e. Religious fare	8	7	14
f. Talk, phone in, interview	15	19	14

And finally where one in every 10 "younger" listeners prefer rock music in general, almost none of the "older" listeners expresses any interest whatever in such fare. Instead, they are considerably more likely to manifest an interest in "easy" music and in the popular music of yesteryear (see Table 2).

Changes in Work and the Changing Role of Women

Work has been critically affected by education and age as have other aspects of social life in America. As work changes so does social class, and social class shifts affect values, interest, and tastes.

Shifts in the structure of the work force as well as in the movement away from production to service occupations have been accompanied by many shifts in the orientations of Americans to both work and its obverse--leisure.

Americans don't derive their satisfactions in life exclusively from their jobs. Estimates suggest that one in every 10 employees is overeducated for the job he/she holds. Public opinion data suggest that for many Americans what they do in their non-work (leisure) hours is as important to them (or even more) as their jobs and careers.

Self-fulfillment is the new rallying cry--on the job, in the home, in the community. It would be a mistake to view these new values as purely selfish or narcissistic.

The simple facts of the matter are that as American economics become increasingly focused on the production and management of information, most employees have not been educated into the "new" sciences of biogenetics, operations research, cybernetics and computer science, astro-physics, and the like. The realization that the new economy calls for highly trained technocrats who will be employed and promoted on the basis of skill and merit alone has propelled many Americans into an urgent scramble for "how to" information, knowledge, and guidance. . .. for a continuing education, as it were.

Similarly, changes in social structure and in the life status of groups and individuals have impelled the seeking of all sorts of "instrumental" information regarding those changes; how to cope with them, and how to take advantage of them. Worth noting once more is the fact that fully 73 percent of the study sample proclaims that it is "very important" for them to become fully apprised of information regarding "human relations."

The media--particularly the print media--have been playing important roles in these quests. In the future they will play even more important roles. It is incumbent on radio to understand the changing information needs of listeners and, especially, to link new programs/services to those needs which can be addressed effectively by radio.

Nothing has been more consequential for American society than changes in women's status and functions. This "revolution" has occasioned radical revisions in the structure of family and household, and in work, education, economics and politics.

Today, females in the population represent a majority: 116.5 million females to 110.0 million males.(11) Projections indicate that by the year 2000 females will outnumber males by 7.7 million.(12) A predominantly female population is a strikingly new phenomenon in the demographic history of the United States.

Most women work these days because the state of the American economy compels them to. Despite information to the contrary, most women who work continue to do so in the stereotyped jobs they have held historically. What is quite new and most interesting are the recent proportionate increases females reflect in jobs that once were considered to be exclusively within the province of males. These sexual shifts in the American labor force--along with their projected growth--comprise the "new woman" phenomenon that has caught the attention of the mass media recently.

"Housewives" are fast becoming an endangered species, with the proportions of working women increasing by fully a third in less than a decade between 1970 and 1978--from 32 million to 42 million.

The gigantic influx of women into the American work force has produced a "new" segmentalization that extends beyond demography.

The entire range of values, interests, activities, and tastes of the American public as a whole will undergo profound changes as a consequence of the new roles for women. The print media have been particularly alert to what is going on, and quick to respond to these changes. With regard to its impact on mass media behavior, a number of important consequences flow from the emergence of the "new woman." Primarily, we note a division of domestic power wherein women will be as important (and even more important) decision-makers as men with regard to the uses that discretionary time and money will be put to. Traditional women's interests, activities and tastes, once focused around home and family, will now be shaped by new educational, work and career experiences. Women will become more cosmopolitan and less parochial. The result will be even greater selectivity in media choices and preferences.

As an introduction to what the "new" woman portends for radio, let us compare an important and growing facet of the phenomenon: the "single, female head-of-household" cohort with the more traditional "housewife" or female "homemaker" cohort. In the BBC sample the latter cohort comprises 26 percent of the total, and the former, 13 percent of the total.

Table 3 shows a sort of bi-modal split in the single-female-head-of-household cohort. The cohort is made up roughly of women "on their own" below the age of 45 who have never married or else have been separated or divorced plus older women who are widowed.

In contrast the "housewife" cohort is currently married, and its age distribution peaks in the 35-54 category.

On the whole the sub-group of single female heads of household shows less educational achievement than does the homemaker sub-group. Yet, the former cohort shows a college-educated sub-component that is equal to the adult population as a whole.

TABLE 3. MAJOR DEMOGRAPHIC AND LIFE STYLE CHARACTERISTICS OF SINGLE, FEMALE HEADS OF HOUSEHOLD AND HOUSEWIVES

Characteristic	Total (N = 1,433)	Single Female Heads of Household (N = 181)	Housewives (N = 372)
Age			
Under 24 years	24%	10%	8%
25-34	24	22	25
35-54	30	25	43
55-64	13	17	14
65 +	9	25	9
Education			
8 years or less	7%	11%	5%
Some high school	14	15	11
High school grad	37	35	44
Some college	19	20	23
College grad	16	16	13
Marital Status			
Currently married	58%	--	100%
Never married	26	26	--
Widowed	7	41	--
Separated/divorced	9	33	--
Household composition			
No children in household	42%	62%	37%
Pre-teens only in household	18	14	26
Teens only in household	22	15	20
Both pre-teens/teens in households	18	9	17
Income			
Less than $15,000	27%	62%	25%
$15,000-$24,999	30	26	36
$25,000-$39,999	29	7	26
$40,000 and over	14	5	13
Racial/ethnic background			
Caucasian	87%	83%	90%
Black	10	15	8
Hispanic	3	2	2
Considers self to be a "modern" person	50%	56%	35%
Considers self to be a "traditional" person	50%	44%	65%
Conformist; "fits in" just like every one else	44%	42%	48%
"Stands out" from the crowd	56%	58%	52%
Opinon leadership re: local matters	34%	31%	40%

The income of households headed by single women is considerably less than that of units featuring a traditional homemaker plus a male "breadwinner" in residence. Two factors contribute to this disparity--a higher proportion of Blacks in the single, female cohort plus, as noted, a disproportionately large sub-component without higher educational status.

Homes with a traditional housewife in them are far more likely than are homes directed by single women to have children in them--particularly children below the age of 13.

Perhaps the most striking data in Table 3 relates to whether these women see themselves as being either modern or traditional in perspective and in lifestyle. The dichotomy betwen the two cohorts is clear-cut. Where, not surprisingly, housewives' overwhelmingly consider themselves as living "traditional" lives with all that that entails, the reverse holds true for the cohort of single women who are household heads. Despite the relatively high incidence of older women in this category, as a sub-group, single female heads of households as compared to housewives are one and one-half times as likely to project themselves as fundamentally "modern" individuals. Further, where housewives appear to be relatively more satisfied with being "just like everyone else," single female heads of households are relatively more eager to project themselves as unique and outstanding.

Given the discussed differences between the two cohorts, we should expect concomitant differences in their interests and activities, their uses of radio and their programming preferences.

Table 4 indicates that on a comparative basis housewives are more likely to be highly interested in "human relations" and national/international affairs, while single women who head households manifest a relatively strong interest in the world of show business and entertainment. (One should not overlook the relatively strong interest in the arts here as well-undoubtedly reflecting the bi-modal character of the single-female-head-of-household cohort.)

As leisure time activities, single women who direct households as compared to "homemakers" are more likely to listen to radio (Table 4). On the other hand, housewives are somewhat more likely to (1) read; (2) go camping, hiking, fishing and such; and (3) engage in gardening--all of which fit in with traditional female "homemaking" roles.

Table 5 indicates that there are very few differences between the two cohorts in regard to the amount of listening they do as well as the basic uses they put radio to. Interestingly, just as everyone else, the two cohorts turn to radio mostly for entertainment and each is more likely than the population in general to fall into the "heavy listener" category. Beyond acting as a major entertainment vehicle, radio is more apt to serve its female listeners who are both unmarried and heads of households as day's end coda; as a vicarious "companion" and as a vehicle providing a modicum of "escape" from the burdens of daily living. Overall, radio appears to be more psychologically functional for these particular household heads than it does for the more traditional female homemakers in the study sample.

TABLE 4. INTERESTS AND ACTIVITIES OF SINGLE, FEMALE HEADS OF HOUSEHOLD AND HOUSEWIVES

	Total (N = 1,433)	Single Female Heads of Household (N = 181)	Housewives (N = 372)
Interests			
Consider it "very important to keep up with"			
a. Human relations	73%	76%	83%
b. Local community/region affairs	51	56	59
c. National/international affairs	49	45	52
d. Ways to make and fix things	48	46	44
e. Business/finance	42	39	41
f. Science/technology	34	26	31
g. The outdoors, camping, hiking	34	28	29
h. Sports	28	20	16
i. Show business/entertainment	22	30	22
j. The arts	20	28	24
Preferred activities			
a. Watch TV	50%	54%	49%
b. Participate in sports/fitness	36	24	24
c. Listen to radio	34	39	29
d. Read books/magazines	25	31	38
e. Read newspapers	15	20	16
f. Sew, knit, crochet	14	29	30
g. Outdoors, camping, hiking	14	5	11
h. Gardening	13	12	17
i. Doing things around the house	12	13	14
j. Cooking/baking	8	14	14
k. Dining out; "going out"	8	7	7
l. Listening to records/tapes	8	7	6
m. Attending sports events	6	2	3
n. Visiting friends/relatives	6	7	4
o. Attending movies	4	3	3
p. Traveling	4	5	2
q. Family get togethers	4	3	5
r. Shopping	3	5	5

TABLE 5. FREQUENCY OF LISTENING, FUNCTIONS OF RADIO AND PROGRAMMING PREFERENCES OF SINGLE, FEMALE HEADS OF HOUSEHOLD AND HOUSEWIVES

	Total (N = 1,433)	Single Female Heads of Household (N = 181)	Housewives (N = 372)
Frequency of Listening			
Light	35%	38%	38%
Moderate	35	36	33
Heavy	30	26	29
Function of Radio			
Listen mostly for news/information	15%	17%	17%
Listen mostly for entertainment/ relaxation	64	61	60
Listen equally for both	19	21	21
a. Starts day off with radio	72	73	70
b. Winds evening up with radio	43	46	36
c. Radio "lifts spirits"	77	86	82
d. Radio provides "companionship"	64	76	69
e. Radio helps to escape everyday pressures	62	72	60
f. Radio helps to keep listener informed	89	90	92
Listens to Available Public Radio			
"Every chance I get"	24%	26%	25%
Once in a while	49	44	53
Never	26	29	23
Listens to Auto Tape vs Radio			
Listens mostly to radio	65%	60%	71%
Listens mostly to tapes	22	13	18
Listens to both about equally	13	26	11
Tune-in Behavior			
Tunes in specific stations for preferred programming	65%	63%	67%
Tunes in for specific programming regardless of station	8	11	6
Twists dial to find favorite fare	28	26	27
Attentiveness to Radio			
Listens to radio without doing anything else:			
Often	25%	23%	20%
Occasionally	26	31	20
Rarely/never	50	46	61
Preferred Programming			
a. News	50%	55%	52%
b. Undifferentiated rock	18	11	10
1. Top 40 rock	12	12	10
2. Contemporary rock	11	8	10
3. Album rock	3	2	2
c. Country/western	32	29	38
d. Nostalgia; beautiful music	17	21	24
e. Classical music; opera	17	25	17
f. Talk	15	17	19
g. Jazz	8	12	8
h. Sports	9	4	2
i. Religious fare	8	10	12
j. Disco	6	6	3

Single women who are homemakers, as compared to their married counterparts, are more likely to be attentive listeners; are more apt to seek out preferred fare, regardless of the particular station that is broadcasting it; are least likely to tune in available PBS radio outlets; and are most apt to divide their attention equally between both cassette tapes and radio where both are available in their autos.

Where traditional female homemakers show a distinct preference for country/western music, single female household heads are more likely to favor classical music fare. Still, the latter are twice as likely to prefer disco music and sports broadcasts as are their more traditional counterparts.

As compared to all listeners (as well as to the single female heads of household) housewives are more likely to voice preferences for religious fare.

The Moderns vs. The Traditionals

By now it should be apparent that "cohort analysis" can be a highly useful decision making tool for radio broadcasters looking into the future. Not only must the neglected demographic cohorts of the past (e.g. listeners aged 35 and over) be examined in depth, but investigation should also focus on the emerging new complex sociological cohorts of significance such as "single, female heads of household." As a final measure, attention should increasingly be turned to the investigation of entirely unexplored social psychological cohorts such as "modern listeners" versus "traditional listeners."

Overall, self-ascribed moderns in the survey sample as compared to self-ascribed traditionalists are more likely to express high interest in seven of 10 subject areas about which respondents were queried.

In particular--when compared with their traditional counterparts, today's moderns are far more likely to manifest a high interest in show business and entertainment; in sports; in the outdoors; and in science and technology (Table 6).

Both moderns and traditionalists manifest a more or less shared interest in local community and national/international matters as well as in the areas of human relations.

Given the differences in interest focus among moderns and traditionalists, it is not surprising to find that the leisure-time activities of the two sub-groups differ from each other in emphasis as well.

Note in Table 7 that self-ascribed moderns prefer to spend their discretionary time listening to records and tapes; and in such "out of home" activities as going to the movies; travelling; and visiting friends and relatives.

In sharp contrast, traditionalists show particularly high preferences for bookreading and for "traditional" homemaker activites such as sewing, knitting and crocheting; gardening; and generally "doing things around the house."

TABLE 6. MAJOR INTEREST OF MODERNS vs. TRADITIONALS

	Moderns (N=607)	Traditionals (N=604)
"Very important" to keep up with what is going on in:		
1. Local community	49%	51%
2. Science technology	54	46
3. National/international affairs	50	50
4. Sports	60	40
5. Arts/literature/music	52	48
6. Show business/entertainment	62	38
7. Business/finance	52	48
8. Human relations	49	51
9. Outdoors	56	44
10. Do it yourself	53	47

TABLE 7. ACTIVITIES OF MODERNS AND TRADITIONALS

Activity	Moderns (N=607)	Traditionals (N=604)
Watch TV	50%	49%
Listen to radio	40	23
Read newspaper	11	20
Listen to records	11	6
Go to movies	4	3
Read books	18	31
Takes part in sports	53	47
Sports spectator	55	45
Cook/bake	7	7
Garden	10	16
Sew	9	20
Family get together	4	4
General home activity	9	15
Dine out	8	7
Travel	5	3
Outdoors	15	13
Shop	4	3
Visit	8	5

In short, traditionalists are "home oriented" in their non-working hours. Moderns are oriented more to "going out"--away from home.

Ordinarily, we have seen that differences in interests and activities are translated into differences in media tastes. In turn, differences in media tastes will affect the way different audiences use the media as well as the fare they prefer to attend.

The fundamental uses moderns make of the media differ markedly from those of the traditionalists as the following data indicate.

For instance, where traditionalists are most apt to use radio for both news and entertainment (a traditional "full" function), moderns are most likely to turn to television for "full" service.

Given their relative high interest in "entertainment," moderns generally are more inclined than traditionalists to use the media for that purpose:

	Use the Medium:					
	Mostly for news/information		Mostly for relaxation/ entertainment		For both about equally	
	Moderns (N=607)	Traditionalists (N=604)	Moderns (N=607)	Traditionalists (N=604)	Moderns (N=607)	Traditionalists (N=604)
Radio	46	54	54	46	39	61
Television	44	56	57	43	46	54
Newspapers	50	50	56	44	44	56

Despite their more general non-serious outlook, however, moderns are considerably more likely than traditional listeners to gain useful ideas from their radio listening, claimed by 61 percent of the moderns as compared to 39 percent of the traditionalists as occurring "very frequently." Moreover, moderns (57 percent) are more apt than are traditionalists (43 percent) to cite radio as "very frequently" affording them a feeling of participating in important happenings that take place around the world.

The uses that moderns put radio to no doubt play an important part in their relatively high frequency of listening to radio overall. Here 60 percent of the moderns fall into the heavy listeners category as compared to 40 percent among the traditionalists.

And given these differentiations in tastes and usage, it is not surprising to find wide differences in radio programming preferences between the two groups.

As compared to the traditionals, modern listeners are more likely to prefer:

1. Undifferentiated rock music by a margin of 26 percent to 11 percent.

2. Top 40 rock by 16 percent to 10 percent.

3. Disco by 9 percent to 3 percent

4. Album rock by 6 percent to 1 percent.

In contrast to the moderns, traditional listeners are more apt to favor:

1. "Nostalgia/Beautiful Music" by a margin of 23 percent to 11 percent

2. News by a margin of 53 percent to 46 p ent.

3. Classical music by 21 percent to 13 percent.

4. Religious programming by 11 percent to 5 percent.

Summary

In summary, the uses of radio are closely tied to the interest and tastes of a number of sub-groups or cohorts in American society. Simple demographic analysis does not adequately describe the many audiences for radio. The data developed in this study, presented in part in Appendix B, provide an initial, but broad, profile of the many factors related to radio usage.

The following section explores the potential impact all of these factors and coming technological development will have on certain elements of today's radio industry.

SECTION I.

- REFERENCES -

(1) This figure is much higher than accepted marketing figures. One factor is the fact that only telephone homes were sampled. A second is that respondents could not see illustrative examples of what a VCR was and may have been confusing video cassette recorders with audio cassette equipment.

(2) Raymond Williams, Television Technology and Cultural Form, New York: Schocken, 1975.

(3) An average of 1.8 radios are located in automobiles. In addition, 51 percent of the automobiles are said to be equipped with a cartridge/cassette player; 28 percent with a citizen band (CB) radio. Among those who have access to both a radio and a tape/cassette player in their autos, 65 percent say they listen mostly to the radio; 22 percent mostly to the player; and 13 percent claim they divide their attention equally between the two.

(4) Harold Mendelsohn, "Listening to Radio" in L. Dexter and D.M. White (eds.), People, Society and Mass Communications, New York: Free Press of Glencoe, 1966.

(5) William F. Massy, "Discriminant Analysis of Audience Characteristics," Journal of Advertising Research, 1966, pp. 39-48.

(6) Elihu H. Katz, H. Haas, and M. Gusevitch, "On the Use of the Mass Media for Important Things," American Sociological Review, 1973, pp. 164-181.

(7) Ronald Frank and M.G. Greenberg, The Public's Use of Television: Who Watches and Why, Beverly Hills: Sage, 1980.

(8) Alvin Toffler, The Third Wave, New York: William Morrow and Co., 1980.

(9) Anthony Smith, Goodbye Gutenberg, Oxford University Press, 1980, p. 137.

(10) The BBC study observes that in the summer of 1982, 73 percent of the adult population in the U.S. believes it is "very important to keep up with" the subject area of "human relations;" 51 percent, with regional and community affairs; 49 percent with national/international affairs and 34 percent, with "the world of science and technology." As noted previously, 20 percent consider it "very important to keep up with the arts."

(11) U.S. Department of Commerce, Bureau of the Census, 1980 Census of Population and Housing, Provisional Estimate of Social, Economic and Housing Characteristics, PHC80-51-1, Table P-1.

(12) U.S. Department of Commerce, Bureau of Economic Analysis, 1980 OBERS BEA Regional Projections, Volume 3, July 1981, page 3.

SECTION II. RADIO TOMORROW--TECHNICAL, MARKET AND ECONOMIC FACTORS

As a variety of new technologies enter the market for video delivery, such as cable television, direct broadcast satellites, multipoint distribution services and subscription television, media attention has focused primarily on the impact it will have on the existing television broadcast structure. There has been little attention paid to the impact on radio of these new technological developments.

In the first section of this report, the results of a listener survey were combined with a projection of changing demographics and tastes to suggest some changes in the nature of radio broadcasting. In this section, the impact of changing technologies will be added to the mix. A view will be presented as to how new technological capabilities will interact with changes in demographics and tastes to reshape the radio broadcasting market over the next decade.

A Historical Perspective

Radio has been one of the most volatile forms of media during the past 50 years. More than television or newspapers, the industry has contended with new market and technological challenges. From the very inception of radio broadcasting to the present, change has been a constant factor in the industry.

Consider the origins of radio. Westinghouse's KDKA, generally acknowledged as the first radio station, was initiated in 1920 primarily to promote the sale of radio receivers.(1) It was a time in which a technology had been developed, but no clear way to extract revenue from that technology and to create a broad market demand had been identified. It is not unlike many of the new electronic technologies today, such as videotex, which can best be described at this point in time as "a technology seeking a market".

A few years after the establishment of KDKA, American Telephone and Telegraph Company tried a different approach to radio broadcasting. It established WEAF in New York as a common carrier radio station selling time at tariffed rates to programmers. (After two months, the station had sold only $550 worth of time.)(2) In this instance, the application of concepts from an established industry (telephones) was being applied to a nascent delivery mode. It is difficult in the early days of a new medium to divorce the uses made of the medium from its antecedent forms.

This was repeated when television first hit the airwaves. The bulk of early television programming consisted of talking heads, television patterning itself primarily on existing successful radio programming. Today cable television programmers, as yet, have not developed many new forms of programming, beyond what is now seen in the movies and on television. Little has been done to take full advantage of the tremendous increase in channel capacity to the home. Where such new forms have developed, they are similar to radio formats, e.g., all news, music, talk.

Radio is an industry, which in its early days was viewed by one observer as something that should not be tied to advertising. In a 1922 article for Radio Broadcast, one observer said, "Reputable advertising agencies ... are openly arrayed against the exploitation of radio for advertising purposes."(3) So much for prophecy.

The post World War II radio industry was confronted with national introduction of television. This supposedly "dead industry" dealt with the substantial impact of broadcast television on the listening habits of the American public at the same time that it absorbed an increase from the 2,800 total radio stations on the air in 1950 to 9,200 today. Its financial structure changed just as drastically during the same period of time, with the radio networks which accounted for 35 percent of revenues in the mid 1940's dropping to a level of approximately five percent today.(4)

In this section, one view of radio in the future will be presented. Much of this is necessarily in the nature of a forecast; and it should be emphasized that a forecast is not a prophecy. The industry is facing a continuous process of change in technology, in regulation and in the interests of its audience. As the radio industry adapts to these changes, there will be no over-night transformations or radical revolutions. What will occur is a gradual shift in the continuous process of the growth and death of radio formats and programming preferences. It will not be unlike the gradual change experienced during the growth of FM when many years passed before FM was acknowledged as being more than competitive with AM.

The future has a history, but will the population's needs for radio remain unchanging? It is too easy to draw a straight line from the past. Those who anticipate change and therefore achieve a strong market position are not just lucky. They have been able to relate changes in the society around them and the economics of the marketplace in which they participate, to strategies applied in their businesses.

Recall that prior to World War II, radio was not an important news medium. The NBC Red Network carried no news in the early 1930's and Blue Network news was relegated to a minor role.(5) But the advent of World War II, which brought a public need for the immediacy of news and elevated current events to a constant concern of the audience, resulted in radio becoming a primary news medium. A singular event such as the World War obviously does cause rapid and unanticipated change. And certainly, in the discussions that follow in this section the reader is reminded that there will be important changes that cannot be foreseen that will also have an important impact on the future shape of radio.

New Technology--A Cornucopia of Possibilities

What technology provides is an increase in the range of what is possible. To move from technological possibility to a viable business is a complicated process. There is always a substantial narrowing of options from the technologically possible to the economically feasible.

Cable. Cable television penetration, which in 1977 was approximately 16.7 percent of U.S. households, is today approximately 30 percent of households (24 million households). It is projected to increase to 50 percent

or more of U.S. households by 1990.(6) This growth will stimulate the development of program alternatives to what is provided by traditional broadcast outlets.

Cable television can affect radio in different ways. It will compete not only for audiences but for revenues.

It has been shown that homes that have cable television spend more time watching TV and therefore might be expected to spend less time with other forms of media. However, the survey results indicate that at this point there is no significant difference between the level of radio listening in cable and non-cable households. Thirty-one percent of cable subscribers are heavy listeners to radio versus 30 percent of non-cable subscribers (see Appendix B).

It should be emphasized, however, that many current cable households are in areas which do not receive many signals over the air and therefore cable is used primarily to augment television broadcast reception. In the future, as large channel capacity systems are built in the United States' suburbs and central cities and deliver a wider variety of programming, it is possible, and in our view likely, that radio listening patterns will be affected.

Some of the new cable programming forms that are evolving are in many ways functionally equivalent to radio. For example, 24 hour television news provides the convenience and ready accessability that heretofore has been limited primarily to radio. Music Television, Warner-Amex's satellite-delivered channel, consists of a primarily rock music format and stereo sound accompanied by video of the performers. It also is functionally equivalent, in certain ways, to radio.

Although primitive in form today, it is expected over the next several years that cable "narrowcast" programming will resemble even more certain elements of radio such as appeal to a narrow market segment and continuity of programming. These are program characteristics that broadcast television, because of its limited number of channels, has been unable to provide.

Cable will also compete with radio for advertising. A look at today's unsold local availabilities and national time on cable might lead one to discount this. Cable advertising is in a primitive state from advertiser understanding and acceptance to sales know-how.

This won't continue indefinitely. In time, some cable programming will draw meaningful audiences of a rating point or more and certain audiences will have well-focused demographics. Both cable program networks and local system operators, facing rising costs, will invest to develop new revenue sources, including advertising.

The $20 to $50 television spot will be alive and well on local cable. The national cable TV spot at $1,000 and less will beckon advertisers either not needing the broadcasters' audience reach or unable to afford the necessary scale of investment. And broad local cable will not be defined as a system confined to a simple franchise. From New York to San Francisco, local cable "interconnects" are developing to cover metropolitan areas. In five

years they will be common. This trend will be reinforced by the cable industry's newest strategy in which a single operator seeks, by sale and trade, to develop system concentrations in a single area.

Just how much impact this will have remains an open question. Aside from news and sports--and "superstations" in areas without a strong local independent TV station--an audience rating of even a one is difficult to attain. However, providing an advertiser a "clustered buy," e.g., one spot placed on 10 cable channels, will provide ratings of five points or more, matching the audience delivery of many radio stations.

Cable radio. It is not just cable's video programming that must be considered by radio broadcasters. Cable also will augment the menu of radio programming available in many communities.

Consider, for example, medium and smaller size markets which cannot support the full array of current radio formats. Typically, many of these markets would not have a station with a full jazz or classical radio format. Certainly very few markets would have stations with a comedy format. But the economics of nationwide distribution of audio programming via cable can provide those formats and even more highly specialized formats to even the smallest markets. A Satellite Syndicated Systems/John Doremus, Inc. joint venture and "The Home Music Store" are two proposed services of this nature.

Cable radio is a product that will take time to develop. Most cable systems don't offer a radio option today, but many of the new systems and many rebuilt or expanded systems are seeking to add more and more products to offer the subscriber in order to develop revenue flows needed to pay for the cost of expensive cable plant.

Cable radio is viewed as a potentially viable product promising moderate additional cash flow with little incremental expense. In those limited cases where cable radio is now available, some operators claim 15 to 30 percent penetration, i.e., 15 to 30 percent of households to whom the service is offered opt to take the service. The audio services in some cases will be supported by direct fees from the subscribers. Services also are expected which will be at least partially advertiser supported.

Pocket TV's. During the Christmas selling season of 1982 the initial introduction of true pocket television sets is planned. Both Sony, with its Watchman, and Sinclair's Microvision are slated for introduction to the marketplace at that time. The Sony product has been announced at a likely introductory price of $280 and Microvision at $99. These are television sets which utilize new forms of video display to provide a package as compact as a transistor radio. It can be expected that prices of these units will drop rapidly over a relatively short period of time.

In summary, an aspect of new technology that must be considered is that it allows another media form, television, to take on some of the functional aspects which are so important to radio. As low cost transistor radios did much to cause a proliferation of receivers in a household and assisted segmentation of radio listening within households, so can low cost and portable television. It will hasten the fragmentation not only of the television market, but through its potential ubiquity, compete directly with that element of the radio market which uses the medium primarily because of its portability.

Cable's competing modes of distribution. Although the preceding paragraphs concentrated on cable as providing new electromagnetic paths into the home, and on broadcast television acquiring some of radio's portability through pocket TV's, it should also be noted that several competing technologies will provide further paths for audio and video programmers. In this report, these technologies are not described in detail. Refer to the National Association of Broadcasters summary of new technologies entitled New Technologies Affecting Radio and Television Broadcasting.(7) The technologies include:

- Direct broadcast satellites where signals will come directly from a high powered satellite to a low cost receiving antenna at the home.

- Multipoint distribution service, a microwave service which may soon be authorized to have substantially expanded bandwidth and which can be expected to provide multichannel video, audio and data services to homes.

- Satellite master antenna systems (or private cable systems) which are similar to cable but are concentrated in large apartment units. In such systems, audio services can be expected to be provided as well as selected video services.

- Other electronic delivery systems exist or are planned which could provide for automated delivery of electronic product to the home. For example, American Broadcasting Companies, Inc. has announced its Home View Network which will, for a fee, electronically deliver recorded video cassettes to the home. In the middle of the night a signal will come into the home, and be recorded on a video cassette for playback at the convenience of the consumer.

- Similar audio based proposals have been made. National Public Radio announced its plans to use a special decoder manufactured by Panasonic and Codart, Inc. for program deliver. The equipment could be used for over-the-air subscription radio programming.(8)

The Impact of Functional Equivalents

In the very brief review of new technologies presented above, it was stressed that many of the new services provided to consumers will be "functionally equivalent" to radio. By that, it is meant that some of the factors key to the usage of radio will be duplicated by other media forms. This includes radio's ubiquity, transportability and targeted programming formats.

As emphasized in Section I, use of radio is closely tied to the individual's lifestyles, tastes and needs--both utilitarian and emotional. With 24 hour television news, video music formats with full stereo capability and pocket television, will "listening to radio" be redefined? It would be presumptuous to assume much effect would be noticed from this new competition

over the next few years. But looking out to 1990 and beyond, it would be shortsighted to ignore the potential competition from these alternative audio/video forms.

Stations. The station segment of the radio industry has undergone dramatic change over the past 30 years. The advent of television led to the decline of radio networks and the movement away from broadly defined entertainment and information based radio programming. What evolved was the development of specific formats as stations took the strategic path of market segmentation to rebuild audiences in the light of broadcast television competition. At the same time that a new medium attracted radio's traditional audiences, station operators were faced with rapid growth in number of stations on the air. This forced further differentiation among stations.

The introduction of FM and more specifically, FM-stereo, provided everything existing AM did plus improved fidelity. The growth of high fidelity recording and playback equipment in homes stimulated the consumer's perceptions of FM's "added value". The analogy with high fidelity, cable delivered music programming is not difficult to draw.(8)

Accompaning these shifts in the delivery structure of the industry has been a shift in the advertising base over years. The industry has seen its share of the total advertising market decline from more than 10 percent of total advertising revenues that were devoted to radio in 1946 to a six to seven percent range of total advertising revenues through the 1970's. It is unlikely that radio will increase its advertising marketshare significantly.

As industry structure shifted, the mix between local, spot and network advertising changed dramatically. Currently, local advertising revenues comprise 75 percent of total industry revenues, up substantially from the 40 percent total share accorded to local radio advertising revenues in the late 1940's (various sources, all derived from FCC financial reports). Network radio accounted for 35 percent of total radio revenues in the mid-1940's; now only four to five percent of radio's revenues flow to the networks. National spot revenues as a percent of total revenues actually increased during the years of network decline from 1949 to 1960, then peaked in the range of 30 to 35 percent in the late 1950's, and have since declined to 20 percent.(9)(10)

What will be the sources of revenue in the 1980's and beyond? Some trends can be suggested. Stations will have to seek continuing economies of operation. This will be forced by a factor at work today--the large number of stations now on the air. Added to this is the likely competition from other distribution forms and the aging of the population. These factors will probably lead to a diminished average use of radio by households by the end of this decade.

As a result, judicious use of satellite delivered programming will probably increase because of its economies. With that, there could be an increase in the percentage of sales which are national, but local sales are expected to remain the primary component of revenues. As mentioned earlier, the salesperson on the street will have to contend with competition from cable in the mid to late 1980's and cable will have to be added to the list of other media which a good salesperson is always prepared to sell against.

Will radio advertising rates change significantly? Although that magic word "efficiency" has often been the most important descriptor of radio sales, it also carries with it a connotation of second rate advertising medium and a ceiling on potential revenues. However, given the highly competitive nature of the radio marketplace, the volatility of market standings of any given station, and, therefore, the volatility of station revenues it is unlikely that we will see any substantial change in radio's position as "the efficient medium."

Certain highly specialized formats, quite likely satellite delivered in large part, might seek to become the "Gucci's" or boutiques of radio and seek much higher rates if they can prove successful in attracting a truly targeted audience. This strategy is, however, double edged. As the market segment attracted narrows, premiums can be charged for the specific nature of the audience. If, however, the audience size decreases more rapidly than the rate premium increases, it is not a successful strategy. Expect some experimentation along this line in the highly targeted formats. If it isn't seen in broadcast radio, it certainly will be seen in non-broadcast modes such as cable radio.

Major change continues even within the radio industry. AM stereo will bring no instant realignment of FM versus AM. There will likely be a shift during this decade in the competitive position of AM versus FM, and a change in the programming content of AM as AM stereo units gradually penetrate U.S. households, and in particular, their automobiles.

Radio networks. The industry has seen radio networks go from being a crucial element in the whole structure of the industry to virtually disappearing from sight with the onset of television broadcasting. National network time sales peaked at approximately $134 million in 1948 and then steadily declined to $35 million 12 years later in 1960. A period of slow growth in the 1960's then accelerated in the mid-1970's with network sales now in excess of $100 million. It is still far below the 1948 figures in current dollars.(11)

Satellite delivery of network programming has had a significant impact on the economics of network operation. In contrast to television, in which transmission costs and station compensation are only a small percentage of total costs, wire line radio networks find that compensation and technical costs can account for 40 to 50 percent or more of total cost of operation. ABC effected some economies when they initially launched four networks sharing one physical line network, but there are line capacity constraints to the economies that can be achieved in this manner.

Satellites have significantly reduced distribution costs and increased time available for network transmission. At the same time, the proliferation of stations and the intense competition in the local marketplace has driven station operators to look toward ways of reducing operating expenses. These two developments are mutually compatible and should lead to the continuing growth of satellite networks. Satellite Music Network, Bonneville, Transtar and ABC Talk Radio, all satellite delivered and designed to increase automation at the station level, were recently described as "full service programmers," yet another distinguishing term among the increasing variety of radio program services.(12)

Current market conditions have slowed the growth of satellite networks. In the view of the authors of this report, that is a temporary phenomenon. The changes in taste and lifestyles, when accompanied by the increase in functionally equivalent alternatives, will require stations to seek an increasingly diverse inventory of program alternatives. The most efficient way to access these alternatives and to mix and create the program content needed in an increasingly competitive marketplace is to make full use of satellite delivered networks (and in addition, syndicated program sources also delivered by satellite).

There are several forms of networks in radio. The fixed line-up network participants, such as ABC, CBS, NBC, Mutual and RKO, are perhaps the most familiar to the public. In addition, the "rep nets" assembled by large radio rep firms such as Blair, Eastman and Katz also have an important role in the industry. Finally, there are ad hoc networks put together for specific events.

Satellite delivery plus marketplace imperatives should help all of these networks increase the amount and diversity of their program offerings in the future. Because of the flexibility of networking introduced by satellite delivery, the lines between these network forms will continue to blur. It is likely that what has in the past been viewed as a fixed line-up network will at times look like an ad hoc network or even a national spot network and similarly for the other forms.

Syndication. Like radio networks, the lines dividing the different types of syndication will blur as much as the distinctions between syndicators and radio networks. Whether considering barter or cash syndicators, format or feature syndicators, satellite delivery will provide both economies of distribution and tremendous flexibility in effecting program dissemination.

ABC's purchase of Watermark is just one instance of the overlap now developing between radio networks and syndication. Networks, as they break out of the limited role of supplying short news and features to stations, will increasingly make direct use of syndicated product themselves. The syndicators market will not, therefore, be limited to direct sale or barter with stations but will in some cases have a new middleman, the radio network, as an important outlet for product.

Concern has been expressed for the future of the small syndicators as networks begin to expand their program offerings. If we view the networks also as distributor for syndicated product, it is believed that there will indeed be a future for the small operator. Looking at the marketplace as it has existed, the small operator always has difficulty in accessing efficiently a large enough number of stations for profitable operation. With the networks, whether fixed, ad hoc or rep, as distributors or "super syndicators," the small program syndicator should have even more opportunity to participate in the marketplace.

As the results of the survey conducted as part of this study indicate, radio stations will be required to do a more refined job of program definition and of developing and executing more refined programming strategies. They will need access to a greater variety of programming. It is in meeting those specialized needs, for example, specialized programming devel-

oped for the working professional woman, that the individual program syndicators will find a greater demand for their product. As features become more specialized and targeted, there will be market niches available for a number of players.

So, in summary, change can be seen at all levels of the radio industry. The demands on radio programmers will be even greater than they are today as they address a more sophisticated marketplace and an even more competitive market environment.

A Bit of the Blue Sky

In reading this section, recall the cautions mentioned earlier about extrapolating too far from technological possibility to market viability. Still, no abatement in the rate of technological change is anticipated. Consider briefly some of the technological developments which will still be subject of speculation late in this decade but could become major factors in the next decade.

Key among these elements is the possibility of providing "demand programmed" audio services. Demand programming is a situation in which the listener can order up any particular selection at a given point in time. It is the old "request radio" taken to the ultimate level of a listener-directed programming.

Current technology can provide such services. The proposed Home Music Store proposes such a service via cable. But other possibilities exist with new technology. Where will such new capacity originate? Possibilities include not only the distribution systems already discussed such as cable, direct broadcast satellite and multipoint distribution service, but also fiber optic delivery systems. These will increasingly be installed both by cable operators and local operating telephone companies. Fiber optics provides huge amounts of bandwidth for delivery of audio and video programming as well as data.

The distribution capacity, available in the 1990's via the telephone company to virtually every home, when combined with signal processing capability such as digital transmission and multiplexing (the combining of many signals over a single distribution path) all suggest that demand programming will be viable. Demand programming will not only have significant impacts on how people obtain their audio services but will have a major impact on the recording industry. Although conceptual schemes have been put forth for demand programming over the air, it would seem that such a delivery scheme will be more than a decade off.

Summing Up

In arraying all of the change factors that could impact radio broadcasting in the future, the question naturally arises as to priorities and emphasis. It would seem that the most immediate change factors are those described in the first section of this report related to changing demographics and taste of the audience. Those changes are already underway. They are wide reaching in nature and are already being felt in the radio marketplace. Rock and the baby boom will not forever remain basic foundations of radio broad-

casting. Whether it is shifts observed in popularity among formats or unexplained changes in measured audience levels, the demographic and psychographic changes impacting radio can already be detected, if not yet understood.

Technological change should be viewed as an element facilitating meeting the needs of the changing marketplace. An aggressive broadcaster should view these new technological possibilities not just as competition but as possible ways of meeting market needs that cannot be achieved as efficiently through traditional broadcast modes (e.g., serving the very narrow market segment). It is a somewhat worn cliche', but it comes back to the eternal consultant's question of "what business are you in?". If you define the business as radio broadcasting, then your reaction to the new technologies is one of moving to counter the new forms of competition. If the definition you reach is a broader one of audio programming or music delivery or information, then clearly strategies will be more broadly based and activities in the future more diversified across delivery technologies.

This report has not attempted to, and indeed could not, provide a map of the future. There is no simple prescription of the best strategy for all radio broadcasters to follow. Each business entity, it is hoped, can use the material presented in this report and its appendices to identify what it deems to be the critical factors of change and to use that understanding in shaping its strategies in the future. It seems appropriate to end the report with a quote from Tofflers The Third Wave: "The future is fluid, not frozen. It is constructed by our shifting and changing daily decisions and each event influences all others." It is hoped that this report will be helpful in aiding those decisions.

SECTION II.

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(8) Wall Street Journal, September 15, 1982, p. 22.

(9) Sydney W. Head, Broadcasting in America: A Survey of Television and Radio, third edition, Boston: Houghton Mifflin, 1976, p. 259.

(10) Television Factbook, 1980.

(11) Ibid., p. 75-a.

(12) Television/Radio Age, August 23, 1982, p. 48.

APPENDIX

APPENDIX A. SURVEY METHODOLOGY

A telephone survey of 1,506 persons was conducted from June 24, 1982 to July 7, 1982. Respondents were from a national sample drawn by Survey Sampling, Inc., Westport, Connecticut at BBC's request. Respondents were limited to persons 18 plus. The sample was controlled to be approximately equally divided by sex. Under BBC's general direction, telephone interviews were conducted by Texas Field Services, Inc., Austin, Texas, a subsidiary of Research and Planning Consultants (RPC).

Interviews were conducted seven days a week. Calls were made in the evening on weekdays and during the day on weekends. In terms of specific amount of listening, respondents were asked about prior day listening. Those unable to identify amount of prior day listening ("don't know") were dropped from the tabulations, reducing the usable sample to 1,433.

The questionnaire, reproduced at the end of this appendix, was developed by Dr. Harold Mendelsohn, University of Denver, and BBC, and was reviewed and approved by NAB. Wherever possible, questions were phrased to allow comparison with similar research studies, particularly with respect to "psychographic" measures.

It should be noted that the question on format preference (Q. 19) was open-ended. Respondents were not read the list of formats unless they were unable to identify "the kinds of programs" they prefer to hear. The answers are preferences and are not necessarily indicative of listening patterns.

A problem was encountered with nostalgia and easy-listening type formats. Listeners most often do not identify formats by labels common within broadcasting. Because the classification of nostalgia and easy-listening formats was uncertain for answers such as "pleasant old songs," the two categories were merged in the data analysis. In rare instances when respondents were unable to identify any type of music, the lists in Q. 19 were read. "Easy listening" was inadvertently omitted from that questionnaire. The omission could result in a slightly lower response rate on this type of music format.

Answers to this question (Q. 19) are not comparable to either measured audience data or surveys in which respondents were asked about specific formats due to the open-ended nature of the responses in this survey. In addition, respondents were asked to identify "two or three" program types they preferred with no ranking made of the preferences.

In questions with multiple responses, percentages do not necessarily add to 100, e.g., Q. 1 and Q. 19.

In cross tabulation, "don't knows" were eliminated for both variables analyzed. Therefore, the base number of respondents in a cross tabulation will vary across tabulations. The tables in Appendix B include the relevant base number for each table.

QUESTIONNAIRE
USES OF RADIO

Hello, my name is _____. I'm calling from RPC, a market research firm in Austin, Texas. I would like to ask you some questions about your use of radio.

First, I would like to ask a few general questions.

1. When you are not busy working--what three or four things do you like to do most in your free time?

(DO NOT READ)

A. Media Behavior

1 Watch TV
2 Listen to radio
3 Read newspapers
4 Listen to records, tapes
5 Attend movies
6 Read books, magazines
7 Attend live plays
8 Attend live dance, concerts, opera
0 Other media behaviors (specify)

B. Home/Family

1 Cook/bake
2 Garden
3 Sew/knit/crochet/handiwork
4 Home repairs/woodwork/carpentry
5 Family get togethers
6 Work with children
7 Entertaining at home
8 General "doing things around the house" unspecified
0 Other home/family activities (specify)

C. Games/Hobbies

1 Cards/board games
2 Video and electronic games
3 Photography
4 Pursues specific hobbies other than photography
0 Other games/hobbies (specify)

D. Participating in sports, jogging, swimming, fitness

1

E. Attending sports/athletic events

1

F. Out-of-home activity

1 Dining out; "going out"
2 Travel
3 Outdoors activities--camping hiking, fishing, hunting
4 Shopping
5 Visiting friends, relatives
6 Volunteer/church community work
0 Other out-of-home activity (specify)

G. Self-improvement (mental)

1 Courses; lectures
2 Attend museums, exhibits
3 Yoga, EST, meditation
0 Other self-improvement (specify)

2. For each item I'm going to mention please tell me whether you now have that item in your home; or whether you are planning to buy one in the next 12 months; or whether you have no plans at all to buy one?

	Now Own	Plan to Buy	No Plans	Don't Know
1. Stereo/hi fi equipment	1	2	3	4
2. Tape/cassette recorder player (audio)	1	2	3	4
3. Video cassette recorder	1	2	3	4
4. Electronic video games	1	2	3	4
5. Video disc player	1	2	3	4
6. Home computer word processor	1	2	3	4

3. How important is it for you--very, fairly, or not important at all--to keep up with what is going on in each of the following?

	Very Important	Fairly Important	Not Important At All	Don't Know
1. Your local community/ region	1	2	3	4
2. The world of science and technology	1	2	3	4
3. National and international issues	1	2	3	4
4. The world of sports	1	2	3	4
5. The arts, classical music, literature	1	2	3	4
6. The world of show business and entertainment	1	2	3	4
7. Business and finance	1	2	3	4
8. Human relations, children, family life	1	2	3	4
9. Outdoor life, camping, hiking	1	2	3	4
10. How to make and fix things yourself	1	2	3	4

4. On the average, about how much time overall--if any--do you personally spend each day:

	None	Less Than ½ hr.	½ hr.- 1 hr.	1 hr.- 2 hrs.	2 hrs.- 3 hrs.	3 hrs.- 4 hrs.	4 hrs. or +	Don't Know
1. Watching television?	1	2	3	4	5	6	7	8
2. Looking at or reading newspapers?	1	2	3	4	5	6	7	8
3. Looking at or reading magazines?	1	2	3	4	5	6	7	8
4. Listening to recorded music on tapes or records?	1	2	3	4	5	6	7	8
5. Playing a home video game like Atari or Intelevision?	1	2	3	4	5	6	7	8

5. How often--if at all--do you go to the movies--at least once a week; one to three times a month; less often than that, or not at all?

1 At least once a week
2 1 to 3 times per month
If "less often", then during the past 12 months, how often did you go to the movies?
3 7 to 11 times
4 3 to 6 times
5 once or twice
6 not at all

6. About how many books--if any--have you completed reading during the six months that just passed? Include only books that you read for your personal pleasure or benefit.

1 None
2 1
3 2-3
4 4-5
5 6 or more
6 Can't recall

7. When you tune in to television do you do it mostly for news and information or do you tune TV in mostly for relaxation and entertainment?

1	News/Information	4	Neither
2	Relaxation/Entertainment	5	Don't know
3	Both		

8. What about newspapers--do you read newspapers mostly for news and information or do you read newspapers mostly for relaxation and entertainment?

1	News/Information	4	Neither
2	Relaxation/Entertainment	5	Don't know
3	Both		

9. Now, when you tune in to the radio do you do so mostly for news and information or do you tune radio in mostly for relaxation and entertainment?

1	News/Information	4	Neither
2	Relaxation/Entertainment	5	Don't know
3	Both		

10. How often do you listen to the radio to get a feeling of taking part in important things--very frequently, fairly frequently, or hardly ever at all?

1	Very Frequently	4	Never
2	Fairly Frequenty	5	Don't know
3	Hardly Ever		

11. How frequently do you listen to the radio for ideas that you can use at home or work or with friends? (Repeat categories if necessary)

1	Very Frequently	4	Never
2	Fairly Frequenty	5	Don't know
3	Hardly Ever		

12. How frequently do you listen to the radio in order to find out about local or national emergencies? (Repeat categories if necessary)

1	Very Frequently	4	Never
2	Fairly Frequenty	5	Don't know
3	Hardly Ever		

12a. Suppose something serious, like a flood or an explosion, suddenly took place near where you live--would radio play a very important part in helping you keep up with what was going on--a fairly important part; or not too important a part at all?

1 Very important part
2 Fairly important part
3 Not too important part
4 Don't know

13. Do you or does your household now pay a fee to subscribe to any kind of Cable or other pay TV service? (If necessary explain--Do you pay to receive television through a special cable or decoder that is attached to your set and allows you to watch channels you ordinarily could not get otherwise?)

1 Yes
2 No
3 Don't know
(If "No" or "Don't know", skip to Q. 16)

14. About how many dollars does it cost each month for you to get your cable TV service?

1 Less than $10
2 $10 to less than $15
3 $15 to less than $20
4 $20 to less than $25
5 $25 or more
6 Don't know

15. Overall, would you say that you are very satisfied with the programs you get on cable TV, fairly satisfied, or not at all satisfied?

1 Very satisifed
2 Fairly satisfied
3 Not at all satisfied
4 Don't know

16. Counting all automobile radios, battery-operated portable radios, stereo and plug-in radios, how many radios altogether are there in your household?

_____

16a. How may of these are automobile radios?

_____

(If "No Automobile" Skip to Q. 17)

16b. Are any of the automobiles belonging to your household equipped with a:

	Yes	No	Don't Know
1. Citizens Band (CB) radio	1	2	3
2. Cartridge or cassette tape player	1	2	3

(If any of the household autos are equipped with BOTH a radio plus a tape player, ask 16C, IF NOT, GO to Q. 17)

16c. When you are in the car that has both--a radio and a tape player--which do you ordinarily listen to most--to the radio or to the tape player?

1 Listens most to radio
2 Listens most to tape player
3 Listent to both equally
4 Can't tell, don't know

17. Think of the times you spent listening to the radio yesterday. How much time did you spend yesterday between 6:00 a.m. and 9:00 a.m. listening to the radio?

(Ask Q. 17a. After Asking Each Time Period)

		Didn't Listen	Hours	Minutes	Can't Recall
1.	6AM-9AM How much time did you spend between	1	2	3	4
2.	9AM-3PM	1	2	3	4
3.	3PM and 6PM	1	2	3	4
4.	6PM-9PM	1	2	3	4
5.	After 9PM	1	2	3	4

17a. Did you spend this particular time listening to the radio mostly at home; mostly in a car; or mostly somewhere else?

		Mostly Home	Mostly Car	Else-where	Can't Recall
1.	6AM-9AM	1	2	3	4
2.	9AM-3PM	1	2	3	4
3.	3PM and 6PM	1	2	3	4
4.	6PM-9PM	1	2	3	4
5.	After 9PM	1	2	3	4

18. Is there a Public Radio station around that you can tune in on your radio? Public radio stations are non-commercial, non-religious, and depend on the contributions of listeners for their support, partially.

1 Yes
2 No
3 Don't know

(If "No" or "Don't know", skip to Q. 19)

18a. (IF YES) How often do you listen to programs on the Public Radio station--every chance you get; once in a while; or never?

1 Listens every chance
2 Once in a while
3 Never
4 Can't recall, don't know

19. When you listen to the radio what two or three kinds of programs do you prefer to hear most of the time? (When "music" is mentioned probe for specific type or format. Read list if necessary.)

A. Music

1 Classical; opera
2 Country-western
3 Disco
4 Golden oldies of 50s and 60s; "Music of Your Life"
5 Rhythm, blues
6 Rock
7 Contemporary rock
8 Album oriented rock
9 Top 40 rock
10 Jazz
0 Other (specify, e.g., Black, Spanish . . .)

B. Non-music

1 News
2 Black; soul programming
3 Educational/instructional
4 Farm; agriculture; nature
5 Radio dramas
6 Religious
7 Spanish
8 Sports
9 Talk; phone in; interviews
0 Other non-music (specify)
x Respondent has no preference; don't know

20. Which happens most often--you tune in the radio in order to listen to something you specifically want to listen to, or, you tune in because you just wish to have the radio on at certain times?

1 Tune in for specifics
2 Tune in just to have radio on
3 Both equally
4 Don't know

21. Which happens most often--you tune in specific radio stations, you look only for specific programming regardless of the station it may be, or you turn the radio dial until you find the programming you like at a given time?

1 Tunes in specific stations
2 Look for specific programming regardless of station
3 Turn dial to find programming you liked at a given time
4 Don't know

22. How often do you just listen to radio without doing anything else at the same time--very often, fairly often, occasionally, or hardly ever at all?

1 Very often
2 Fairly often
3 Occasionally
4 Hardly ever at all
5 Never
6 Don't know

23. For each statement I will read to you, please tell me whether it describes how you feel or not.

	Yes	No	Can't Tell
1. I like to start off the day with radio.	1	2	3
2. Like to wind up the evening with radio.	1	2	3
3. Listening to the radio lifts my spirits.	1	2	3
4. Listening to the radio provides me with companionship, and keeps me from getting lonely.	1	2	3
5. Listening to the radio helps me to get away from the pressures of everyday living.	1	2	3
6. Listening to the radio keeps me informed about what is happening.	1	2	3

24. When talking to friends, neighbors, and relatives--do you usually have a lot to say, a fair amount to say, or just a little bit to say about the following:

	A Lot	Fair Amount	Just a Little Bit	Don't Know
1. What is going on in the United States and in foreign countries	1	2	3	4
2. What products and services are worthwhile trying	1	2	3	4
3. What is going on in your neighborhood and community	1	2	3	4
4. What radio programs and stations are worthwhile listening to	1	2	3	4
5. Where to go for information about all sorts of things	1	2	3	4

25. Overall, do you feel you have a great deal of control over the things that affect your life, a fair amount of control, or hardly any control at all?

1 Great deal
2 Fair amount
3 Hardly any at all
4 Don't know

26. I'm going to read several pairs of statements. For each pair, please tell me the one statement that decribes you best:

Are you:

26.A. 1. A modern person or
2. a traditional person
3. Both
4. Don't know

Are you:

26.C. 1. A hard-working person or
2. a fun-loving person
3. Both
4. Don't know

Are you:

26.E. 1. A person who tends to have many, many friends, or
2. a person who tends to have just a few close friends
3. Both
4. Don't know

Are you:

26.G. 1. A person who enjoys being one of the crowd just like everyone else, or
2. one who enjoys being different from other people--standing out from others
3. Both
4. Don't know

27. Counting yourself and all infants and babies, how may individuals altogether live in your household?

_____

27a. Of all these individuals, how many are between the ages of 13 and 21?

_____

27b. How many are younger than 13?

_____

28. What was the last grade of regular school that you completed--not counting specialized schools like secretarial, art or trade schools?

1 Grade school or less (0-8)
2 Some high school (9-11)
3 High school grad. (12)
4 Some college (13-15)
5 College graduate (16)
6 Post graduate (17, plus)
7 Can't recall

29. What is your current marital status--never married; married; widowed; separated or divorced; or some other arrangement?

1 Married
2 Never married
3 Widowed
4 Seperated/divorced
5 Other arrangement

30. What is your approximate age?

1 Below 24
2 25-34
3 35-54
4 55-64
5 65 and over

31. Are you the chief wage earner in your household?

1 Yes
2 No
3 Don't know

31a. IF YES: What job do you work at?

_____

31b. IF NO: What job does the chief wage earner work at, or is he/she not working at this time?

_____

01 Top management; top talent; major professional
02 Executive; administrative; lesser professional
03 Owner--small business or retail outlet
04 Farmer (owner/manager)
05 Technician; minor administrative
06 White collar; clerical (non-supervisory)
07 Salesperson
08 Skilled and semi-skilled labor
09 Unskilled labor

10 Housewife
11 Student
12 Retired
13 Looking for work
14 Not employed

32. Is the combined total annual income of your household--before taxes:

1 Less than $15,000
2 Between $15,000 and $25,000
3 Between $25,000 and $40,000
4 $40,000 and more
5 Doesn't know

33. What is your racial or ethnic background?

1 Caucasian
2 Black
3 Hispanic
4 Other (specify)
5 Doesn't know

34. Sex of respondent:(Don't read)

1 Male
2 Female

I attest that this is a true and accurate interview.

_____

Signature Date

APPENDIX B. SURVEY RESULTS

The following tables are a complete presentation of tabulations (frequencies and percentages) of the 34 questions asked. A large number of cross tabulations were performed (in excess of 400) and only a selected number are presented in this appendix. Those desiring other cross tabulations should address requests to NAB's research department. Standard statistical tests were applied to all tabulations and cross tabulations.

When comparing this raw tabulation data (Appendix B.1) with earlier tables and the cross tabulation in Appendix B.2, consider the following differences. The raw data tabulated here are based on the full sample of 1,433 respondents. Questions in the appendix with N less than 1,433 reflect those respondents not answering a particular question. Percentages in the appendix are based on the N shown.

The percentages shown in the text tables are based only on those responses listed in the table. Therefore, percentages in the text tables will add up to 99 to 101 percent.

B.1 TABULATIONS

1. When you are not busy working--what three or four things do you like to do most in your free time? (N=1,433)

(DO NOT READ)

A. Media Behavior	Freq.	Pct.
1. Watch TV	719	50.2
2. Listen to radio	493	34.4
3. Read newspapers	214	14.9
4. Listen to records, tapes	116	8.1
5. Attend movies	52	3.6
6. Read books, magazines	359	25.1
7. Attend live plays	1	0.1
8. Attend live dance, concerts, opera	33	2.3
9. Other media behaviors (specify)	14	1.0

B. Home/Family	Freq.	Pct.
1. Cook/bake	110	7.7
2. Garden	185	12.9
3. Sew/knit/crochet/handiwork	202	14.1
4. Home repairs/woodwork/carpentry	47	3.3
5. Family get togethers	56	3.9
6. Work with children	36	2.5
7. Entertaining at home	25	1.7
8. General "doing things around the house" unspecified	169	11.8
9. Other home/family activities (specify)	107	7.5

C. Games/Hobbies	Freq.	Pct.
1. Cards/board games	55	3.8
2. Video and electronic games	24	1.7
3. Photography	9	6.3
4. Pursues specific hobbies other than photography	30	2.1
5. Other games/hobbies (specify)	93	6.5

D. Participating in sports, jogging, swimming, fitness	Freq.	Pct.
	501	35.0

E. Attending sports/athletic events	Freq.	Pct.
	92	6.4

F. Out-of-home activity	Freq.	Pct.
1. Dining out; "going out"	116	8.1
2. Travel	54	3.8
3. Outdoors activities--camping, hiking, fishing, hunting	199	13.9
4. Shopping	50	3.5
5. Visiting friends, relatives	87	6.1
6. Volunteer/church community work	22	1.5
7. Other out-of-home activity (specify)	58	4.1

G. Self-improvement (mental)	Freq.	Pct.
1. Courses; lectures	6	0.4
2. Attend museums, exhibits	4	0.3
3. Yoga, EST, meditation	3	0.2
4. Other self-improvement (specify)	19	1.3

2. For each item I'm going to mention please tell me whether you now have that item in your home; or whether you are planning to buy one in the next 12 months; or whether you have no plans at all to buy one?

	Now Own		Plan to Buy		No Plans		Don't Know	
	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
1. Stereo/hi fi (N=1,429)	1,161	81.2	54	3.8	207	14.5	7	0.5
2. Tape/cassette recorder player (audio) (N=1,428)	998	69.9	47	3.3	370	25.9	13	0.9
3. Video cassette recorder (N=1,425)	206	14.5	80	5.6	1,117	78.4	22	1.5
4. Electronic video games (N=1,428)	318	22.3	89	6.2	1,003	70.2	18	1.3
5. Video disc player (N=1,425)	34	2.4	36	2.5	1,331	93.4	24	1.7
6. Home computer, word processor (N=1,427)	41	2.9	95	6.7	1,266	88.7	25	1.8

3. How important is it for you--very, fairly, or not important at all--to keep up with what is going on in each of the following?

	Very Important		Fairly Important		Not Important At All		Don't Know	
	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
1. Local comm/region (N=1,433)	731	51.0	518	36.1	176	12.3	8	0.6
2. World of science and technology (N=1,433)	488	34.1	588	41.0	346	24.1	11	0.8
3. Nat'l and int'l issues (N=1,430)	702	49.1	515	36.0	206	14.4	7	0.5
4. World of sports (N=1,429)	404	28.3	489	34.2	533	37.3	3	0.2
5. Arts, classical music, lit. (N=1,431)	292	20.4	521	36.4	612	42.8	6	0.4
6. Show business, entertainment (N=1,428)	314	22.0	582	40.8	526	36.8	6	0.4
7. Business and finance (N=1,428)	597	41.8	496	34.7	330	23.1	5	0.4
8. Human relations, children, family life (N=1,432)	1,040	72.6	272	19.0	116	8.1	4	0.3
9. Outdoor life, camping, hiking (N=1,428)	488	34.2	459	32.1	478	33.5	3	0.2
10. How to make and fix things yourself (N=1,432)	689	48.1	471	32.9	261	18.2	11	0.8

4. On the average, about how much time overall--if any--do you personally spend each day:

	None		Less than 1/2 hr.		1/2-1 hr.		1-2 hrs.		2-3 hrs.		3-4 hrs.		5 or more hrs.		Don't Know	
	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
1. Watching TV (N=1,433)	64	4.5	64	4.5	279	19.5	380	26.5	264	18.4	142	9.9	232	16.2	8	0.6
2. Looking at or reading newspaper (N=1,432)	147	10.3	274	19.1	795	55.5	175	12.2	25	1.7	4	0.3	10	0.7	2	0.1
3. Looking at or reading magazines (N=1,433)	304	21.2	390	27.2	556	38.8	122	8.5	29	2.0	7	0.5	8	0.6	17	1.2
4. Listening to recorded music on tapes or records (N=1,433)	365	25.5	194	13.5	332	23.2	176	12.3	89	6.2	52	3.6	205	14.3	20	1.4
5. Playing a home video game like Atari or Intelevision (N=1,429)	1,185	82.9	89	6.2	86	6.0	35	2.4	9	0.6	2	0.1	13	0.9	10	0.7

5. How often--if at all--do you go to the movies--at least once a week; one to three times a month; less often than that, or not at all? (N=1,433)

		Freq.	Pct.
1.	At least once a week	142	9.9
2.	1-3 times/month	445	31.1
3.	7-11 times/year	38	2.7
4.	3-6 times/year	139	9.7
5.	Once or twice	308	21.5
6.	Not at all	361	25.2

6. About how many books--if any--have you completed reading during the six months that just passed? Include only books that you read for your personal pleasure or benefit. (N=1,412)

		Freq.	Pct.
1.	None	322	22.8
2.	1	117	8.3
3.	2-3	276	19.5
4.	4-5	161	11.4
5.	6 or more	536	38.0

7. When you tune in to television do you do it mostly for news and information or do you tune TV in mostly for relaxation and entertainment? (N=1,424)

		Freq.	Pct.
1.	News/information	381	26.8
2.	Relaxation/entertainment	624	43.8
3.	Both	397	27.9
4.	Neither	22	1.5

8. What about newspapers--do you read newspapers mostly for news and information or do you read newspapers mostly for relaxation and entertainment? (N=1,424)

		Freq.	Pct.
1.	News/information	953	66.9
2.	Relaxation/entertainment	167	11.7
3.	Both	220	15.4
4.	Neither	84	5.9

9. Now, when you tune in to the radio do you do so mostly for news and information or do you tune radio in mostly for relaxation and entertainment? (N=1,428)

		Freq.	Pct.
1.	News/information	210	14.7
2.	Relaxation/entertainment	917	64.2
3.	Both	274	19.2
4.	Neither	27	1.9

10. How often do you listen to the radio to get a feeling of taking part in important things--very frequently, fairly frequently, or hardly ever at all? (N=1,383)

		Freq.	Pct.
1.	Very frequently	174	12.4
2.	Fairly frequently	278	19.8
3.	Hardly ever	657	46.8
4.	Never	295	21.0

11. How frequently do you listen to the radio for ideas that you can use at home or work or with friends? (Repeat categories if necessary) (N=1,404)

	Freq.	Pct.
1. Very frequently	174	12.4
2. Fairly frequently	278	19.8
3. Hardly ever	657	46.8
4. Never	295	21.0

12. How frequently do you listen to the radio in order to find out about local or national emergencies? (Repeat categories if necessary) (N=1,412)

	Freq.	Pct.
1. Very frequently	400	28.3
2. Fairly frequently	475	33.6
3. Hardly ever	398	28.2
4. Never	139	9.8

12a. Suppose something serious, like a flood or an explosion, suddenly took place near where you live--would radio play a very important part in helping you keep up with what was going on--a fairly important part; or not too important a part at all? (N=1,423)

	Freq.	Pct.
1. Very important	1,157	81.3
2. Fairly important	177	12.4
3. Not important	89	6.3

13. Do you or does your household now pay a fee to subscribe to any kind of Cable or other pay TV service? (If necessary explain--Do you pay to receive television through a special cable or decoder that is attached to your set and allows you to watch channels you ordinarily could not get otherwise?) (N=1,423)

	Freq.	Pct.
1. Yes	568	39.9
2. No	855	60.1

14. About how many dollars does it cost each month for you to get your cable TV service? (N=569)

	Freq.	Pct.
1. Less than $10	131	23.0
2. $10 to less than $15	100	17.6
3. $15 to less than $20	145	25.5
4. $20 to less than $25	81	14.2
5. $25 or more	63	11.1
6. Don't know	49	8.6

15. Overall, would you say that you are very satisfied with the programs you get on cable TV, fairly satisfied, or not at all satisfied? (N=565)

	Freq.	Pct.
1. Very satisfied	196	34.7
2. Fairly satisfied	293	51.9
3. Not at all satisfied	65	11.5
4. Don't know	11	1.9

16. Counting all automobile radios, battery-operated portable radios, stereo and plug-in radios, how many radios altogether are there in your household? (N=1,430)

	Freq.	Pct.
0	2	0.1
1	43	3.0
2	122	8.5
3	194	13.6
4	220	15.4
5	224	15.7
6	210	14.7
7	134	9.4
8	114	8.0
9	49	3.4
10	57	4.0
11	18	1.3
12	22	1.5
12	21	1.5

16a. How many of these are automobile radios? (N=1,429)

	Freq.	Pct.
0	116	8.1
1	456	31.9
2	569	39.8
3	201	14.1
4	56	3.9
5	19	1.3
6	6	0.4
6	6	0.4

16b. Are any of the automobiles belonging to your household equipped with a:(N=1,379)

	Yes		No		Don't Know	
	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
1. Citizens band (CB) radio	383	27.8	990	71.8	6	0.4
2. Cartridge or cassette tape player	704	51.1	672	48.7	3	0.2

16c. When you are in the car that has both--a radio and a tape player--which do you ordinarily listen to most--to the radio or to the tape player? (N=694)

	Freq.	Pct.
1. Most to radio	449	64.7
2. Most to tape	150	21.6
3. Both equally	90	13.0
4. Can't tell, don't know	5	0.7

17. Think of the times you spent listening to the radio yesterday. How much time did you spend between _____ and _____ listening to the radio? (Presented below is the total time spent during the day. For a daypart breakout, contact the National Association of Broadcasters)

	Freq.	Pct.
1. 1/2 hour or less	328	22.9
2. More than 1/2 hour to 1 hour	177	12.4
3. More than 1 hour to 2 hours	209	14.6
4. More than 2 hours to 3 hours	182	12.7
5. More than 3 hours to 4 hours	106	7.4
6. More than 4 hours to 5 hours	75	5.2
7. More than 5 hours to 6 hours	81	5.7
8. More than 6 hours to 7 hours	51	3.6
9. More than 7 hours	224	15.6

17a. Did you spend this particular time listening to the radio mostly at home; mostly in a car; or mostly somewhere else?

	Mostly Home		Mostly Car		Else-where		Can't Recall	
	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
1. 6AM-9AM (N=842)	547	65.0	225	26.7	66	7.8	4	0.5
2. 9AM-3PM (N=712)	398	55.9	184	25.8	127	17.8	3	0.4
3. 3PM-6PM (N=677)	329	48.6	262	38.7	85	12.6	1	0.1
4. 6PM-9PM (N=492)	325	66.1	126	25.6	39	7.9	2	0.4
5. After 9PM (N=371)	295	79.5	58	15.6	15	4.0	3	0.8

18. Is there a Public Radio station around that you can tune in on your radio? Public radio stations are non-commercial, non-religious, and depend on the contributions of listeners for their support, partially. (N=1,432)

Yes		No		Don't Know	
Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
758	53.3	303	21.3	361	25.4

18a. (IF YES) How often do you listen to programs on the Public Radio station--every chance you get; once in a while; or never? (N=781)

	Freq.	Pct.
1. Listens every chance	188	24.1
2. Once in a while	380	48.7
3. Never	204	26.1
4. Can't recall, don't know	9	1.2

19. When you listen to the radio what two or three kinds of programs do you prefer to hear most of the time? (When "music" is mentioned probe for specific type or format. Read list if necessary.)

A. Music (N=1,375)	Freq.	Pct.
1. Classical, opera	244	17.8
2. Country western	464	33.8
3. Disco	83	6.0
4. Nostalgia, easy listening	247	18.0
5. Rhythm, blues	42	3.1
6. Rock	256	18.6
7. Contemp. rock	162	11.8
8. Album oriented rock	50	3.6
9. Top 40 rock	174	12.7
10. Jazz	111	8.1
0. Other	69	5.0

B. Non-music (N=1,375)	Freq.	Pct.
1. News	717	52.2
2. Black, soul	14	1.0
3. Educ., instruction	43	3.1
4. Farm, agriculture, nature	18	1.3
5. Radio dramas	19	1.4
6. Religious	109	7.9
7. Spanish	1	0.1
8. Sports	126	9.2
9. Talk, phone in, interviews	212	15.4
0. Other	31	2.3

20. Which happens most often--you tune in the radio in order to listen to something you specifically want to listen to, or, you tune in because you just wish to have the radio on at certain times? (N=1,431)

	Freq.	Pct.
1. For specifics	481	33.6
2. Just to have radio on	832	58.1
3. Both equal	100	7.0
4. Don't know	18	1.3

21. Which happens most often--you tune in specific radio stations, you look only for specific programming regardless of the station it may be, or you turn the radio dial until you find the programming you like at a given time? (N=1,430)

		Freq.	Pct.
1.	Tune in specific station	907	63.4
2.	Just to have radio on	112	7.8
3.	Both equally	387	27.1
4.	Don't know	24	1.7

22. How often do you just listen to radio without doing anything else at the same time--very often, fairly often, occasionally, or hardly ever at all? (N=1,429)

		Freq.	Pct.
1.	Very often	150	10.5
2.	Fairly often	199	13.9
3.	Occasionally	363	25.4
4.	Hardly ever at all	507	35.5
5.	Never	202	14.1
6.	Don't know	8	0.6

23. For each statement I will read to you, please tell me whether it describes how you feel or not.

		Yes		No		Can't Tell	
		Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
1.	Start the day (N=1,431)	1,031	72.0	392	27.4	8	0.6
2.	End of day (N=1,430)	619	43.3	785	54.9	26	1.8
3.	Lifts my spirits (N=1,431)	1,108	77.4	282	19.7	41	2.9
4.	Companionship (N=1,430)	914	63.9	486	34.0	31	2.2
5.	Relieves pressure (N=1,430)	881	61.6	510	35.7	39	2.7
6.	Keeps me informed (N=1,424)	1,269	89.1	147	10.3	9	0.6

24. When talking to friends, neighbors, and relatives--do you usually have a lot to say, a fair amount to say, or just a little bit to say about the following:

		A lot		Fair Amount		A Bit		Don't Know	
		Freq.	Pct.	Freq.	Pct.	Freq.	Pct.	Freq.	Pct.
1.	U.S./foreign countries (N=1,428)	392	27.5	432	30.3	580	40.6	24	1.7
2.	Products (N=1,427)	260	18.2	425	29.8	673	47.2	69	4.8
3.	Neighborhood (N=1,427)	493	34.5	481	33.7	416	29.2	37	2.6
4.	Radio (N=1,413)	234	16.6	353	25.0	746	52.8	80	5.7
5.	Information (N=1,419)	242	17.1	418	29.5	652	45.9	107	7.5

25. Overall, do you feel you have a great deal of control over the things that affect your life, a fair amount of control, or hardly any control at all? (N=1,430)

		Freq.	Pct.
1.	Great deal	553	38.6
2.	Fair amount	688	48.1
3.	Hardly any at all	162	11.3
4.	Don't know	27	1.9

26. I'm going to read several pairs of statements. For each pair, please tell me the one statement that decribes you best:

Are you:

26.A. (N=1,432)	Freq.	Pct.
1. Modern	607	42.4
2. Traditional	604	42.2
3. Both	180	12.6
4. Don't know	41	2.9

26.C. (N=1,432)	Freq.	Pct.
1. Hard working	700	48.9
2. Fun-loving	199	13.9
3. Both	509	35.5
4. Don't know	24	1.7

26.E. (N=1,432)	Freq.	Pct.
1. Many friends	622	43.4
2. Few friends	732	51.1
3. Both	9	0.6
4. Don't know	69	4.8

26.G. (N=1,432)	Freq.	Pct.
1. One of the crowd	549	38.3
2. Enjoys standing out	706	49.3
3. Both	14	1.0
4. Don't know	163	11.4

27. Counting yourself and all infants and babies, how may individuals altogether live in your household? (N=1,423)

No. of Persons	Freq.	Pct.
1	164	11.5
2	406	28.5
3	308	21.6
4	268	18.8
5	163	11.5
6	57	4.0
7	24	1.7
8	16	1.1
8	17	1.2

27a. Of all these individuals, how many are between the ages of 13 and 21? (N=1,418)

Person 13-21	Freq.	Pct.
0	848	59.8
1	273	19.3
2	184	13.0
3	69	4.9
4	24	1.7
5	12	0.8
6	8	0.6

27b. How many are younger than 13? (N=1,418)

No. of Preteens	Freq.	Pct.
0	909	64.1
1	260	18.3
2	165	11.6
3	68	4.8
4	10	0.7
5	4	0.3
5	2	0.1

28. What was the last grade of regular school that you completed--not counting specialized schools like secretarial, art or trade schools? (N=1,423)

		Freq.	Pct.
1.	Grade school or less	108	7.6
2.	Some high school	201	14.1
3.	High school grad	522	36.7
4.	Some college	273	19.2
5.	College grad	233	16.4
6.	Post grad	79	5.6
7.	Can't recal	7	0.5

29. What is your current marital status--never married; married; widowed; separated or divorced; or some other arrangement? (N=1,426)

		Freq.	Pct.
1.	Married	811	56.9
2.	Never married	366	25.7
3.	Widowed	94	6.6
4.	Separated/divorced	125	8.8
5.	Other	30	2.1

30. What is your approximate age?

		Freq.	Pct.
1.	Below 24	342	24.0
2.	25-34	341	23.9
3.	35-54	424	29.7
4.	55-64	181	12.7
5.	65 and over	138	9.7

31. Are you the chief wage earner in your household? (N=1,419)

		Freq.	Pct.
1.	Yes	714	50.3
2.	No	678	47.8
3.	Don't know	27	1.9

31a. IF YES: What job do you work at? (N=733)

		Freq.	Pct.
1.	Top management; top talent;major professional	36	4.9
2.	Executive; administrative; lesser professional	156	21.3
3.	Owner--small business or retail outlet	28	3.8
4.	Farmer (owner/manager)	10	1.4
5.	Technician; minor administrative	105	14.3
6.	White collar; clerical (non-supervisory)	83	11.3
7.	Salesperson	23	3.1
8.	Skilled and semi-skilled labor	168	22.9
9.	Unskilled labor	4	0.4
10.	Housewife	6	0.8
11.	Student	4	0.5
12.	Retired	95	13.0
13.	Looking for work	2	0.3
14.	Not employed	13	1.8

31b. IF NO: What job does the chief wage earner work at, or is he/she not working at this time? (N=651)

	Freq.	Pct.
1. Top management; top talent;major professional	31	4.8
2. Executive; administrative; lesser professional	147	21.8
3. Owner--small business or retail outlet	37	5.7
4. Farmer (owner/manager)	28	4.3
5. Technician; minor administrative	98	15.1
6. White collar; clerical (non-supervisory)	35	5.4
7. Salesperson	31	4.8
8. Skilled and semi-skilled labor	156	24.0
9. Unskilled labor	5	0.8
10. Housewife	1	0.2
11. Student	2	0.3
12. Retired	69	10.6
13. Looking for work	1	0.2
14. Not employed	15	2.3

32. Is the combined total annual income of your household--before taxes: (N=1,323)

	Freq.	Pct.
1. Less than $15,000	287	21.7
2. Between $15,000 and $20,000	317	24.0
3. Between $25,000 and $40,000	306	23.1
4. $40,000 and more	149	11.3
5. Doesn't know	264	20.0

33. What is your racial or ethnic background? (N=1,421)

	Freq.	Pct.
1. Caucasian	1,205	84.8
2. Black	131	9.2
3. Hispanic	47	3.3
4. Other	27	1.9
5. Doesn't know	11	0.8

34. Sex of respondent:(Don't read) (N=1,429)

	Freq.	Pct.
1. Male	679	47.5
2. Female	750	52.5

B.2 CROSS TABULATIONS

Q.2 vs Q.17 Respondents were asked in Q.2 their plans with respect to purchase of various electronic products. How do these plans correlate with level of radio listening.*

		Radio Listening			
1.	Stereo/Hi-Fi Ownership	Light (N=501)	Moderate (N=490)	Heavy (N=431)	Total (N=1422)
	Now own	77.45%	81.63%	86.54%	81.65%
	Plan to buy	2.79	4.29	4.41	3.8
	No plans	19.76	14.08	9.05	14.56
2.	Audio Tape Recorder or Player	Light (N-500)	Moderate (N=489)	Heavy (N=426)	Total (N=1415)
	Now own	67.00%	70.55%	74.65%	70.53%
	Plan to buy	1.80	4.70	3.52	3.32
	No plans	31.20	24.74	21.83	26.15
4.	Electronic Video Games	Light (N=498)	Moderate (N=486)	Heavy (N=426)	Total (N=1410)
	Now Own	19.88%	21.40%	27.00%	22.55%
	Plan to buy	4.02	7.82	7.28	6.31
	No plans	76.10	70.78	65.73	71.13

*Note: Light listeners (1 hour or less)
Moderate (More than 1 hour to 4 hours)
Heavy (More than 4 hours)

Q. 4 vs Q. 17 Respondents time spent with other media was compared with time spent listening to radio.

1.

Time spent watching TV daily	Radio Listening			
	Light (N=503)	Moderate (N=492)	Heavy (N=430)	Total (N=1425)
None	4.57%	4.67%	4.19%	4.49%
Less than 1 hr.	27.24	24.19	20.23	24.07
1 to 3 hrs.	46.92	45.73	42.56	45.19
3 hrs. plus	21.27	25.41	33.02	26.25

2.

Time spent with Newspapers daily	Light (N=504)	Moderate (N=496)	Heavy (N=430)	Total (N=1430)
None	9.52%	9.27%	12.33%	10.28%
Less than 30 min.	21.03	17.34	19.07	19.16
30 min. to 1 hr.	53.17	61.90	51.16	55.59
1 hr. plus	16.27	11.49	17.44	14.97

3.

Time spent reading magazines daily	Light (N=498)	Moderate (N=488)	Heavy (N=430)	Total (N=1416)
None	24.10%	20.90%	19.07%	21.47%
Less than 30 min.	28.11	27.25	27.21	27.54
30 min. to 1 hr.	35.94	41.80	40.23	39.27
1 hr. plus	11.85	10.04	13.49	11.72

4.

Time spent listening to tapes or records daily	Light (N=496)	Moderate (N=490)	Heavy (N=427)	Total (N=1413)
None	36.09%	23.67%	16.39%	25.83%
Less than 1 hr	40.73	41.02	28.81	37.23
1 to 4 hrs.	15.52	25.10	27.40	22.43
4 hrs. plus	7.66	10.20	27.40	14.51

5.

Movie attendance	Light (N=505)	Moderate (N=497)	Heavy (N=431)	Total (N=1433)
Once a week	4.36%	10.87%	15.31%	9.91%
1 to 3 per month	24.75	34.81	34.11	31.05
7 to 11 per year	1.58	4.02	2.32	2.65
3 to 6 per year	8.91	9.66	10.67	9.70
1 to 2 per year	24.95	19.92	19.26	21.49
Not at all	35.45	20.72	18.33	25.19

Q.7 vs Q.17 How do respondents reasons for using television relate to the amount of radio listening?

Use television primarily for	Radio Listening: Light (N=503)	Moderate (N=492)	Heavy (N=429)	Total (N=1424)
News/information	28.63%	25.81%	25.64%	26.76%
Relax/entertain.	38.77	45.33	48.02	43.82
Both	30.82	27.85	24.48	27.88
Neither	1.79	1.02	1.86	1.54

Q.7 vs Q.26A Respondents were asked whether they considered themselves more a modern or a traditional person. This perception was compared with their reasons for using television (excluding those considering themselves both traditional or modern or unable to choose).

Use television primarily for	Modern (N=603)	Traditional (N=601)	Total (N=1204)
News/information	23.88%	30.28%	27.08%
Relax/entertain.	51.24	39.27	45.27
Both	23.55	28.29	25.91
Neither	1.33	2.16	1.74

Q. 7 vs Q. 26C. Respondents were asked whether they considered themselves hard working or fun loving. This perception was compared to their reasons for using television (excluding those considering themselves both hard working and fun loving or unable to choose).

Use television primarily for	Hard Working (N=697)	Fun Loving (N=197)	Total (N=894)
News/information	30.27%	21.32%	28.30%
Relax/entertainment	42.32	54.31	44.97
Both	25.82	23.35	25.28
Neither	1.58	1.02	1.45

Q. 7 vs Q.28 The uses made of television are compared with the respondents' educational level.

Use television primarily for	Education						
	Grade School or less (N=106)	Some H.S. (N=200)	H.S. Grad (N=520)	Some College (N=271)	College Grad (N=231)	Post Grad (N=77)	Total (N=1407)
News/Info	25.47%	17.50%	22.88%	27.31%	36.36%	46.75%	26.72%
Relax/Entertain	47.17	57.50	46.92	41.33	34.20	22.08	43.92
Both	26.42	24.00	29.04	30.26	26.84	25.97	27.79
Neither	0.94	1.00	1.15	1.11	2.60	5.19	1.56

Q.8 vs Q.28 The uses made of newspapers are compared with the respondents' educational level.

Use newspapers primarily for	Grade School or less (N=104)	Some H.S. (N=201)	H.S. Grad (N=517)	Some College (N=271)	College Grad (N=233)	Post Grad (N=79)	Total (N=1407)
News/Info	60.58%	64.68%	62.48%	66.42%	79.83%	74.68%	66.88%
Relax/Entertain	14.42	15.42	14.70	7.75	6.44	7.59	11.66
Both	10.58	10.95	16.63	21.40	11.16	16.46	15.49
Neither	14.42	8.96	6.19	4.43	2.58	1.27	5.97

Q. 8 vs Q. 23 Respondents' primary reasons for using radio are compared with other purposes for which they listen to radio.

1.

Use radio primarily for	Like to start off the day with radio		
	Yes (N=1028)	No (N=390)	Total (N=1426)
News/Info	14.01%	16.92%	14.73%
Relax/Entertain	63.72	64.62	64.17
Both	21.40	13.85	19.21
Neither	0.88	4.62	1.89

2.

Use radio primarily for	Like to wind up the evening with radio		
	Yes (N=618)	No (N=781)	Total (N=1425)
News/Info	10.84%	18.05%	14.74%
Relax/Entertain	68.61	60.82	64.21
Both	19.90	18.18	19.16
Neither	0.65	2.94	1.89

3.

Use radio primarily for	Radio lifts my spirits		
	Yes (N=1104)	No (N=281)	Total (N=1426)
News/Info	12.05%	25.98%	14.73%
Relax/Entertain	67.21	54.09	64.17
Both	19.84	14.23	19.21
Neither	0.91	5.69	1.89

4.

Use radio primarily for	Radio provides companionship		
	Yes (N=910)	No (N=486)	Total (N=1426)
News/Info	12.97%	18.31%	14.73%
Relax/Entertain	65.16	62.55	64.17
Both	20.99	15.43	19.21
Neither	0.88	3.70	1.89

Continued

5. Use radio primarily for — Radio helps with pressures of living

	Yes (N=878)	No (N=508)	Total (N=1425)
News/Info	11.39%	20.28%	14.74%
Relax/Entertain	68.91	57.09	64.14
Both	18.91	18.90	19.23
Neither	0.80	3.74	1.89

6. Use radio primarily for — Radio keeps me informed

	Yes (N=1264)	No (N=147)	Total (N=1420)
News/Info	15.27%	9.52%	14.65%
Relax/Entertain	62.26	79.59	64.15
Both	21.28	2.72	19.30
Neither	1.19	8.16	1.90

Q.9 vs Q.28 The uses made of radio are compared with the respondents' educational level.

Use radio primarily for	Grade School (N=105)	Some H.S. (N=200)	H.S. Grad (N=521)	Some College (N=272)	College Grad (N=232)	Post Grad (N=79)	Total (N=1411)
News/information	15.24%	11.00%	14.97%	9.56%	18.10%	25.32%	14.53%
Relax/entertainment	54.29	73.00	65.45	69.12	57.33	53.16	64.35
Both	28.57	14.00	17.66	19.12	23.71	18.99	19.28
Neither	1.90	2.00	1.92	2.21	0.86	2.53	1.84

Q.13 vs Q.17 Whether respondents subscribed to a cable or other pay TV service was compared with amount of radio listening.

Amount of radio listening	Subscribe to cable or pay TV		
	Yes (N=568)	No (N=855)	Total (N=1423)
Light	38.91%	32.87%	35.28%
Moderate	30.28	37.54	34.65
Heavy	30.81	29.59	30.08

Q.16c vs Q.17 Whether a respondent with a tape player in a car listens mostly to radio or to tape is compared with amount of radio listening.

Amount of radio listening	Listening mostly to radio or tape			
	Radio (N=449)	Tape (N=150)	Both Equally (N=90)	Total (N=689)
Light	28.95%	36.00	25.56	30.04%
Moderate	37.64	33.33	28.89	35.56
Heavy	33.41	30.67	45.56	34.40

Q.20 vs Q.17 Whether a respondent tunes in the radio for specifics or "just to have it on" is compared with amount of radio listening.

Tune in	Amount of radio listening			
	Light (N=490)	Moderate (N=493)	Heavy (N=430)	Total (N=1413)
For specifics	38.57%	33.87%	29.07%	34.04%
Just to have on	55.51	58.42	63.26	58.88
Both equally	5.92	7.71	7.67	7.08

Q.21 vs Q.17 Whether the listener most often tunes in to a specific station, specific programming, or just turns the dial is compared with amount of radio listening.

Tunes in to	Amount of radio listening: Light (N=487)	Moderate (N=489)	Heavy (N=430)	Total (N=1406)
Specific stations	65.91%	61.35%	66.51%	64.51%
Specific programs	7.39	9.41	6.98	7.97
Turns the dial	26.69	29.24	26.51	27.52

Q.21 vs Q.17 Whether a responsdent tends to listen to radio without doing anything else is compared with amount of radio listening.

Tunes in without doing anything else	Light (N=496)	Moderate (N=495)	Heavy (N=430)	Total (N=1421)
Very often	5.44%	10.30%	16.74%	10.56%
Fairly often	8.27	13.74	20.93	14.00
Occasionally	22.58	27.07	27.21	25.55
Hardly ever	40.52	38.59	26.74	35.68
Never	23.19	10.30	8.37	14.22

23.1 vs Q. 17 Whether a respondent likes to start the day with radio is compared with amount of radio listening.

Amount of radio listening	Likes to start the day with radio: Yes (N=1031)	No (N=392)	Can't tell (N=8)	Total (N=1431)
Light	27.16%	56.12%	37.50%	35.15%
Moderate	36.28	30.61	37.50	34.73
Heavy	36.57	13.27	25.00	30.12

).23.2 vs Q.17 Whether a respondent likes to end the day with radio is compared with amount of radio listening.

Amount of radio listening	Likes to end the day with radio			
	Yes (N=619)	No (N=785)	Can't tell (N=26)	Total (N=1430)
Light	19.71%	47.52%	30.77%	35.17%
Moderate	37.80	32.10	42.31	34.76
Heavy	42.49	20.38	26.92	30.07

Q.29 vs Q17 Marital status was compared with amount of radio listening.

Amount of radio listening	Marital status				
	Married (N=811)	Never Married (N=366)	Widowed (N=94)	Separated Divorced (N=125)	Total (N=1396)
Light	30.83%	24.32%	45.74%	32.80%	35.53%
Moderate	33.66	35.25	37.23	36.00	34.53
Heavy	26.51	40.44	17.02	31.20	29.94

Q.30 vs Q.17 Age was compared with amount of radio listening.

Amount of radio listening	Age					
	18-24 (N=342)	25-34 (N=341)	35-54 (N=424)	55-64 (N=181)	65+ (N=138)	Total (N=1426)
Light	21.05%	32.84%	40.80%	43.09%	50.00%	35.34%
Moderate	33.63	36.36	34.67	30.39	37.68	34.57
Heavy	45.32	30.79	24.53	26.52	12.32	30.08

Q.30 vs Q.19 Major format preferences were compared to respondents' ages. (N=1426)

N=	241	462	83	245	256	162	50	173	111	714	108	126	211	1426
	Classical/ opera	C&W	Disco	Nostalgia/easy listening	Rock	Contemp. Rock	Album Rock	Top 40 Rock	Jazz	News	Religious	Sports	Talk	Total
Below 24	6.2	15.2	49.4	8.2	55.1	39.5	52.0	42.8	23.4	14.2	13.0	32.5	17.1	24.0
25 - 34	20.8	24.9	21.7	18.8	28.5	35.2	36.0	30.6	15.3	22.0	19.4	22.2	24.2	23.9
35 - 54	37.3	38.7	19.3	35.1	14.8	21.6	10.0	22.0	34.2	33.6	28.7	23.8	37.9	29.7
55 - 64	17.8	10.6	8.4	21.6	0.4	3.1	2.0	3.5	20.7	17.2	23.2	16.7	11.9	12.7
65 plus	17.8	10.6	1.2	16.3	1.2	0.6	0.0	1.2	6.3	13.0	15.7	4.8	9.0	9.7

Q.4.1 vs Q.19 Major format preferences were compared with time spent watching television daily (N=1425)

N=	242	462	82	247	254	162	49	174	111	713	109	126	210	1425
None	6.2	4.3	2.4	2.8	2.0	3.7	4.1	1.7	2.7	5.8	6.4	3.2	6.2	4.5
Less than 1hr.	25.6	21.9	19.5	23.1	26.4	22.2	20.4	21.3	28.8	22.9	34.9	24.6	20.5	24.1
1 to 3 hrs.	50.0	46.5	39.0	49.4	39.0	45.1	46.9	46.0	42.3	47.0	37.6	43.7	50.0	45.2
3 hrs. plus	18.2	27.3	39.0	24.7	32.7	29.0	28.6	31.0	26.1	24.4	21.1	28.6	23.3	26.3

Q.2.4 vs Q.19 Major format preferences were compared with electronic game ownership. (N=1410)

N=	239	458	81	245	253	158	49	172	110	709	105	124	210	1410
	Classical/ opera	C&W	Disco	Nostalgia/easy listening	Rock	Contemp. Rock	Album Rock	Top 40 Rock	Jazz	News	Religious	Sports	Talk	Total
Now own	16.7	25.1	25.9	23.3	26.9	27.2	28.6	34.3	26.4	18.9	14.3	28.2	23.3	22.6
Plan to buy	5.9	5.9	4.9	4.1	13.8	13.9	12.2	8.7	6.4	5.1	4.8	4.8	5.7	6.3
No plans	77.4	69.0	69.1	72.7	59.3	58.9	59.2	57.0	67.2	76.0	81.0	66.9	71.0	71.1

Q.2.1 vs Q.19 Major format preferences were compared with stereo/hi-fi ownership (N=1422)

N=	242	459	82	247	254	162	50	174	110	713	107	125	212	1422
Stero/Hi-Fi														
Now own	84.3	82.4	84.2	79.4	86.2	88.3	92.0	83.9	79.1	79.9	75.7	84.0	84.0	81.7
Plan to buy	2.9	3.1	8.5	3.2	1.5	3.7	2.0	6.9	3.6	3.5	3.7	1.6	2.8	3.8
No plans	12.8	14.6	7.3	17.4	6.3	8.0	6.0	9.2	17.3	16.6	20.6	14.4	13.2	14.6

Q. 17 vs Q. 19 Major format preferences were compared with amount of listening (N=1433)

N=	244	464	83	247	256	162	50	174	111	718	109	126	212	1433
	Classical/ opera	C&W	Disco	Nostalgia/easy listening	Rock	Contemp. Rock	Album Rock	Top 40 Rock	Jazz	News	Religious	Sports	Talk	Total
Light	38.9	33.8	25.3	38.1	26.6	30.9	26.0	27.6	30.6	30.6	45.9	29.4	26.9	35.2
Moderate	34.8	33.8	44.6	34.0	32.4	34.6	34.0	35.1	35.1	40.5	31.2	41.3	37.7	34.7
Heavy	26.2	32.3	30.1	27.9	41.0	34.6	40.0	37.4	37.4	28.8	22.9	29.4	35.4	30.0

Q. 26A vs Q.19 Major format preferences were compared with self-classification as a modern or traditional person (N=1211)

N=	204	380	70	202	221	135	43	156	91	603	94	107	171	1211
Modern	38.2	47.4	77.1	32.7	70.1	52.6	81.4	62.8	44.0	46.4	31.9	55.1	45.6	50.1
Traditional	61.8	52.6	22.9	67.3	29.9	47.4	18.6	37.2	56.0	53.6	68.1	44.9	54.4	49.9

Q.19 Respondents were asked to list up to two or three preferences in radio formats.

Considering only music formats, an analysis was conducted of other formats listed by respondents identifying a specific format.

Classical

110 respondents mentioning classical music (45.12% of the total mentioning classical) listed only classical music as a preferred music format. Of the 134 other respondents mentioning classical music, 150 other music format mentions were made. The most frequent mentions were:

Country	44
Rock (all four categories)	44
Nostalgia/easy listening	39

Country

233 respondents mentioning country (50.2% of the total mentioning country) listed only country as a preferred music format. Of the 231 other respondents mentioning country, 262 other format music mentions were made. The most frequent mentions were:

Rock (all categories)	130
Nostalgia/easy listening	45
Classical	44

Disco

19 respondents mentioning disco (22.9% of the total mentioning disco) mentioned only disco as a preferred music format. Of the 64 other respondents mentioning disco, 82 other music format mentions were made. The most frequent mentions were:

Rock (all categories)	43
Country	19

Nostalgia/easy listening

123 respondents mentioning nostalgia/easy listening (NEL) -- 49.8% of the total mentioning NEL -- mentioned only NEL as a preferred music format. Of the 124 other respondents mentioning NEL, 135 other music format mentions were made. The most frequent mentions were:

Country	45
Classical	39
Rock (all categories)	32

Rock (all four categories summed)

251 respondents mentioning rock (39.1% of the total mentioning rock) mentioned only rock as a preferred music format. Of the 391 other respondents mentioning rock, 460 other music format mentions were made. The most frequent mentions were:

A second/third rock format	192
Country	130
Classical	44
Disco	43

Jazz

52 respondents mentioning jazz (46.9% of the total mentioning jazz) mentioned only jazz as a preferred music format. Of the 59 other respondents mentioning jazz, 72 other music format mentions were made. The most frequent mentions were:

Country	24
Rock (all four categories	19
Classical	15

Perhaps the most notable aspect of this analysis is the broad appeal of the country format across listeners' other preferences. Country was the first or second most mentioned alternative format for all formats analyzed. Another characteristic of this analysis is that for most formats, 40 to 50 percent of listeners mention only one preferred format. Disco, with 23 percent of its devotees mentioning only disco, is the least exclusive of the formats analyzed.